SurfControl®

Version 5.5

SurfControl Web Filter

Administrator's Guide

NOTICES

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TABLE OF CONTENTS

Notices i

Introduction to Web Filter 1
About SurfControl Web Filter 2

Basic Configuration 3
Introduction 4
- Basic Web Filter Service Settings 4
- Initial Monitored Data Settings 4
- Basic Rules Configuration 4
- Scheduling Tasks 4
- Reporting 4

Basic Service Settings 5
- Accessing the Service Settings 5
- Understanding the Settings 5
- More Information 8

Initial Monitored Data Settings 9
- The Default Monitor Settings 9
- More Information 12

Basic Rule Configuration 13
- Recommendations for Creating and Applying Rules 13

Scheduling Tasks 14
- More Information 14

Remote Administration 15
Introduction 16
- What the Remote Administration Client Does 16
- Prerequisites 16

Licensing 17
Licensing Web Filter 18
- Entering a Web Filter License Key 18

Privacy Edition 19
What It Does 20
- Comparing the Standard and Privacy Editions 20

Privacy Edition Features 22
- Change the Manager and Union passwords 22
- Viewing User Details 22

The Web Filter Manager 25
Introduction 26
- Opening the Web Filter Manager 26

Working With the Web Filter Manager 27
- The Navigation Pane 27
- The Central Pane 27
- The Information Pane 28

SurfControl Web Filter 30
Data Displayed 30
Tasks 30
Web Filter Server 32
Server Information Dashboard 32
Tasks 33
Monitored Data 34
Data 34
Filters 34
Users 36
Summary User Information 36
Detail User Information 36
Tasks 38
Monitored Data Tasks 39
Monitored Users Tasks 41
Monitored Connections Tasks 44
Destinations 45
Detail Destination Information 45
Tasks 46
Monitored Destinations tasks 47
Categories 49
Summary Category Information 49
Detail Category Information 49
Tasks 51
Categories tasks 51
Content Protection 52
Maintenance 53

Rules Administrator 55
Introduction 56
Guidelines For Rule Creation 56
Rule Objects 59
Who Objects 60
Creating User Defined Who Objects 61
Where Objects 64
Creating User Defined Where Objects 64
Category Object 67
Where Lists 69
What Objects 70
Protocols/Ports Objects 70
Precise Bandwidth Controls Object 73
What Lists 74
When Objects 75
Allowance Objects 78
10 MB Volume Object 78
30 Minute Time Object 79
Notify Objects 81

HTTP Deny Page Objects 84
Default 84
Allowance 85
Other HTTP Deny Page Objects 86
Constructing HTTP Deny Pages 86
Viewing Another Collector 87

Real Time Monitor 89
Introduction 90
Display Columns 92
Category Color 93
Other Settings 93
Collector Details 94
Stopping and Starting the Real-Time Monitor 95

Web Filter Settings 97
Introduction 98
How To Configure the Web Filter Settings 98
Available Settings 99
Start/Stop Service Tab 100
Active Directory Tab 101
Subnets Tab 102
Subnet Monitoring 102
Advanced Tab 104
Network Settings 104
TCP/IP Name Resolution (DNS) 105
Monitor to Database Settings 105
Categorization Tab 106
Categorization 106
Company Domains and Intranet Destinations 106
Internet Threat Database Improvement Program 106
Protocol Signatures Tab 107
Ignored Ports Tab 108
Creating new ports 109
Username Resolution 109
Enterprise User Monitoring 110
Real-Time Monitor Tab 111
Database Tab 112
E-mail Notifications Tab 114

Custom Categorization 117
Introduction 118
How It Works 118
The VCA in Evaluation Mode 118
Using Custom Categorization 119
List of Destinations Tab 119
VCA Settings Tab 121
VCA Results Tab 122
The VCA Service Settings 124

Databases 127
Creating a New SQL Server Database 128
Managing databases 129
Archive 130
Purge 130
Compact 131
Delete 131
Restore 132
Options 133
Updating Your Database 134
Upgrading your database 136
Importing/exporting databases 137
exporting manually categorized sites 137
Importing manually categorized sites 138

Scheduler 139
Introduction 140
Available Events 142
Command Line 142
Database Management 142
Database Update 143
Internet Threat Database Update 144
Network Groups Update 144

Appendix 145
Contact Technical Support 146
Sales and Feedback 148

Index 149

Chapter 1

Introduction to Web Filter

About SurfControl Web Filter . . . . . page 2

ABOUT SURFCONTROL WEB FILTER

Web-based e-mail, file downloads, Instant Messaging (IM), Peer to Peer (P2P), and unauthorized Web surfing can expose your enterprise network to serious, debilitating attacks and undesirable code, including spyware, adware, malware, and pornography. SurfControl Web Filter offers a proactive security solution that protects your enterprise against known, emerging, and customer-specific threats before they reach your network.

Your IT staff will appreciate how easy it is to deploy and manage SurfControl's enterprise-wide Web protection. With fewer administrative headaches, they can focus on other important assignments and projects.

SurfControl Web Filter allows you to actively monitor network use and abuse anywhere in your organization. You can even extend real-time protection to mobile users who connect to the corporate network with SurfControl Mobile Filter. The same corporate security rules apply, so mobile devices are shielded from unwanted intrusions, minimizing unexpected shutdowns that lead to lapses in productivity.

SurfControl Web Filter bolsters your defenses by providing:

- **Bullet proof infrastructure security** – Automatic, real-time security updates through our comprehensive threat database, which is constantly kept current with knowledge gathered by our global threat experts.
- **Legal liability protection** – Prevents circulation of inappropriate content that violates copyright laws or infringes rights.
- **Regulatory compliance** – Helps you meet HIPAA, Sarbanes-Oxley, and other industry or government security requirements.
- **Enhanced employee productivity** – Limits Web surfing and downtime due to attacks and improves IT productivity because it's easy to implement and manage.

Chapter 2

Basic Configuration

Introduction . . . . . page 4

Basic Service Settings . . . . . page 5

Initial Monitored Data Settings . . . . . page 9

Basic Rule Configuration . . . . . page 13

Scheduling Tasks . . . . . page 14

INTRODUCTION

This chapter introduces you to some basic features and configuration settings that will help you set up Web Filter effectively.

This chapter will cover the following:

BASIC WEB FILTER SERVICE SETTINGS

This section explains some of the service settings for Web Filter. These settings control how Web Filter monitors Internet traffic and the actions it takes when blocking access to sites. This section covers:

- Where to find the service settings.
- What some of the basic service settings do.
- What effect changing the settings will have.
- Where to find more information.

INITIAL MONITORED DATA SETTINGS

Web Filter allows you to monitor various Internet behaviors, and apply settings to individual users or groups. This section covers:

- Where to find the monitor settings.
- What the default settings are.
- The other settings that are available.

BASIC RULES CONFIGURATION

You can either implement some of the default rules supplied with Web Filter or construct your own. This section explains how you should approach rule creation.

SCHEDULING TASKS

You can organize tasks that need to be performed when Internet traffic is low, or when your users are not logged on to your network. This section describes what events are available.

REPORTING

For reporting with Web Filter, you need to install SurfControl Report Central. This section describes some of the features of our reporting tool.

BASIC SERVICE SETTINGS

This section will explain some of the basic service settings for Web Filter.

ACCESSING THE SERVICE SETTINGS

You can access the service settings in one of three ways:

- From the **Control Panel > SurfControl Web Filte**r menu item.
- By right-clicking the SurfControl Web Filter icon in the notification area of the taskbar and selecting **Configure Web Filter Service** from the menu.
- From the **Configuration** menu item in the **Web Filter Manager** navigation tree.

UNDERSTANDING THE SETTINGS

This section explains the features of some of the service settings and further options you may want to consider.

This section covers:

- Stopping and starting the service
- Configuring subnets for balancing the load on your Web Filter server.
- E-mail notifications

Restart the Web Filter Service

Web Filter can require you to restart the Web Filter service before changes you have made can be applied. These changes can include changing the Web Filter service settings. You can restart the service by right-clicking the SurfControl Web Filter icon and selecting **Restart Web Filter Service**.

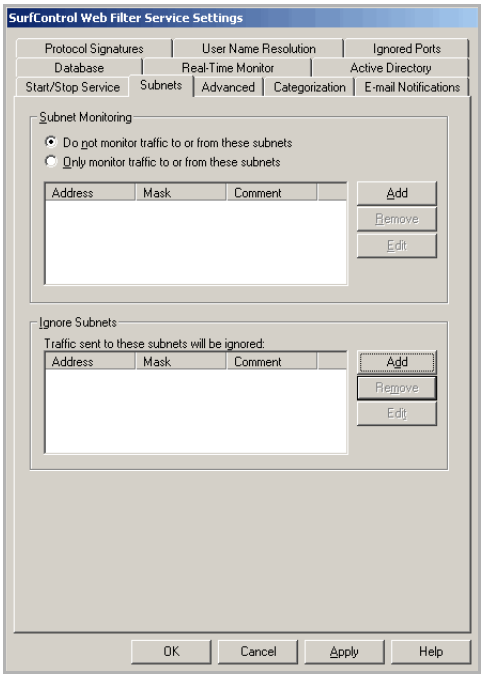
Note: This option is also available in the Start/Stop Service tab of the SurfControl Web Filter Service Settings dialog.

You can also stop or start the Web Filter service by right-clicking the Web Filter icon and selecting **Start Web Filter service** or **Stop Web Filter service**.

Configure Subnets

Configuring subnets helps to reduce or balance the load on your Web Filter server(s), enabling it to work more efficiently. Use the Subnets tab to configure subnets:

Figure 2-1 Subnets tab



The Subnets tab has two sections:

- **Subnet Monitoring** – These settings help reduce or balance the load on your Web Filter server.
- **Ignore Subnets** – These settings show the internal subnets that were detected when you ran the Configuration Wizard. These subnets are not monitored.

Subnet Monitoring

The Subnet Monitoring section is used to identify which parts of your network should be monitored or not by each Web Filter server. How you decide on this, depends on whether you have single or multiple Web Filter servers, and how you want to divide the network volume load of traffic between those servers. To configure your subnets on a single Web Filter server:

1 Identify the external traffic subnets you do not want to monitor.

2 Click the **Subnets** tab, and click **Add**.

3 Enter the IP address of the subnet in the **IP Address** text box.

4 Enter the subnet mask in the **Mask** text box.

5 Click **OK**.

6 Repeat steps 1 to 5 for other subnets you do not want to monitor.

7 Select **Do not Monitor traffic to or from these subnets**.

By configuring subnets on multiple Web Filter servers, you ensure the subnets are only monitored on one server in your network environment. You need to specifically identify subnets you do not want to monitor on one Web Filter server, and define one or more subnets you do want to monitor on each subsequent Web Filter server. This allows you to divide the volume load of network traffic across your servers, making them more efficient. To configure your subnets on multiple Web Filter servers:

1 Identify the subnets you do not want to monitor.

2 On the first Web Filter server, click the **Subnet** tab, and click **Add**.

3 Enter the IP address of the subnet in the **IP Address** text box.

4 Enter the subnet mask in the **Mask** text box.

5 Click **OK**.

6 Repeat steps 1 to 5 for other subnets you do not want to monitor.

7 Select **Do not Monitor traffic to or from these subnets**.

8 For each subsequent Web Filter server, you should identify a specific subnet that you do want to monitor. To do this, identify subnets you do want to monitor, and follow steps 2 to 5.

9 Select **Only Monitor traffic to or from these subnets**.

Ignore Subnets

The internal subnets detected during the initial running of the Configuration Wizard are listed in the **Ignore Subnets** section of the Subnets tab. You also have the following options:

- **Add** a new subnet.
- **Remove** a subnet.
- **Edit** the IP address or subnet mask for an existing subnet.

E-mail Notifications

When running the Configuration Wizard during installation, you were asked to give the following e-mail setup information:

- E-mail Server
- Recipient Address
- From Address

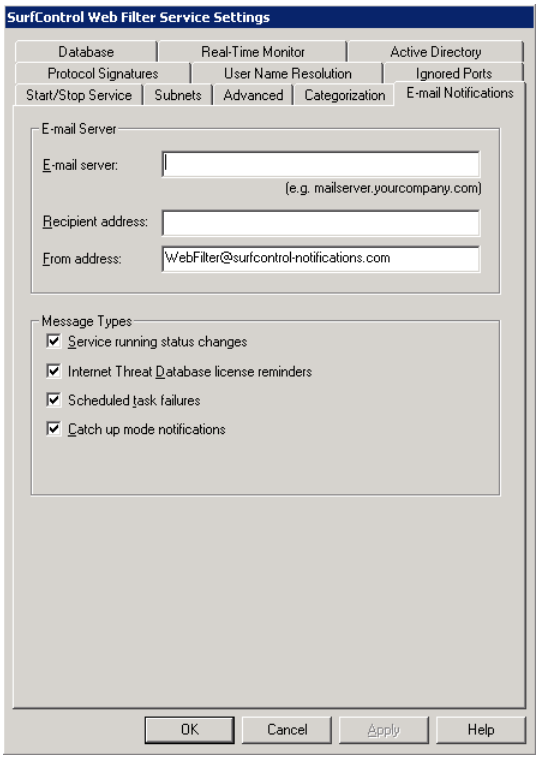
You were also asked to select the types of messages that the System Administrator should receive alerts about:

- **Service running status changes** – If the Web Filter or Scheduler service is stopped or started.
- **Internet Threat Database license reminders** – A reminder will be sent when a subscription to the Internet Threat Database is due for renewal. A reminder will be sent a month from expiry, then a week from expiry, and a day from expiry. Once a subscription has expired a reminder will be sent every 24 hours.
- **Scheduled task failures** – If any scheduled task fails to run successfully.

- **Catch up mode notifications** – If the service becomes overloaded, monitoring will be restricted to HTTP traffic. If the overload becomes critical, monitoring will be temporarily suspended. An e-mail will be sent when Web Filter enters and exits catch up mode.

You can edit these settings via the E-mail Notification tab shown below:

Figure 2-2 E-mail Notification tab



There are three other e-mail alerts that the recipient address will receive:

- **Unlicensed product reminders** - If you are using an unlicensed product past its thirty day trial period, you will be sent daily reminders.
- **Internet Threat Database category changes** - As the Global Threat Experts add new categories to the Internet Threat Database, this e-mail informs you of any modifications that have been made.
- **Internet Threat Database updates** - A reminder is sent if it is more than a week (seven days) since an Internet Threat Database update.

MORE INFORMATION

For more details on the other Service Settings, see Chapter 9.

INITIAL MONITORED DATA SETTINGS

This section will explain what the default monitoring settings are for Web Filter, and what other options are available.

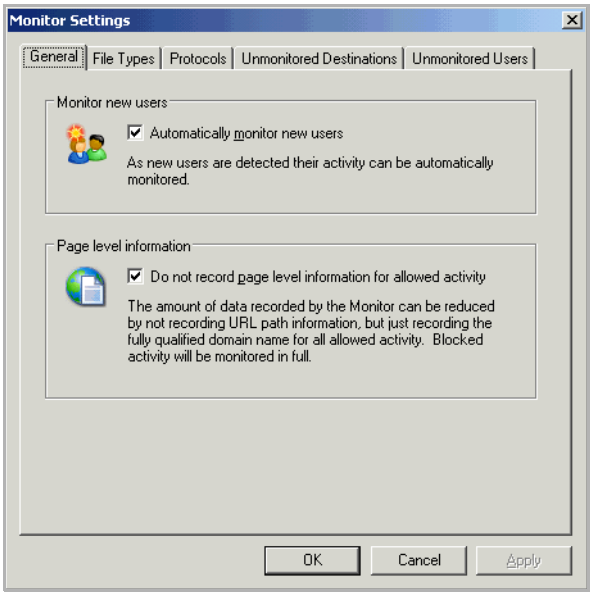
Accessing the Monitor Settings

1 To access the Monitor Settings, select: **Start > All Programs > SurfControl Web Filter > SurfControl Web Filter Manager**.

2 In the **Navigation** tree, select **Monitored Data** for your Web Filter collector or database.

3 In the Information panel, click **Monitor Settings** from the Monitored Data **Tasks** panel.

Figure 2-3 Monitor Settings dialog box


Monitor Settings
General
File Types
Protocols
Unmonitored Destinations
Unmonitored Users
Monitor new users
Automatically monitor new users
As new users are detected their activity can be automatically monitored.
Page level information
Do not record page level information for allowed activity
The amount of data recorded by the Monitor can be reduced by not recording URL path information, but just recording the fully qualified domain name for all allowed activity. Blocked activity will be monitored in full.
OK
Cancel
Apply

THE DEFAULT MONITOR SETTINGS

Web Filter's default settings enable you to start monitoring users and their Internet connections immediately. You can see the Internet traffic generated by your users as it happens by opening the **Real-Time Monitor** from the **Web Filter Manager > Content Protection** menu, or from the **Start > All Programs > SurfControl Web Filter** menu. This traffic is then saved to your database, where it can be viewed in the **Monitored Data** window, and can also be used by **SurfControl Report Central** for generating reports. The Monitor Settings allow you to control what activity is saved to the database.

Note: Any change made to the Monitored Data settings only affects data from that point onwards. It does not affect historic data.

Table 2-1 Monitor Settings

Tab	Description
General	**Monitor new users** By default all new users who log on to your network are detected by Web Filter, and their Internet activity is automatically monitored. You can select not to automatically monitor new users. **Page level information** This option is selected by default. It will only store the domain name of an allowed site. For example, www.allowedsite.com/someinfo will be stored as www.allowedsite.com. This can help reduce the size of your monitor database. With this option selected, you will just see a '/' in the Detail column. All blocked sites are stored with the full path. For example: www.blockedsite.com/music/mp3
File Types	By default, only certain web page file types (asp, aspx, htm, html, jsp, mspx, shtml, stm) are monitored. The complete list of file types is shown in Table 2-2 on page 12. Monitoring of too many file types can impact on the performance of Web Filter. If you suspect a certain file type is being accessed significantly, select the file type and monitor it for a set period of time. You have the following options when selecting **Monitored custom file types**: • Select the **file type**. All file extensions associated with this file type are monitored. • Select a specific **file extension**. The file type entry which this extension belongs to will be grayed out, indicating a partial selection for this file type. You can also create your own groups with customized lists of file extensions. See "Create New File Type Groups" on page 39 for more details.

Table 2-1 Monitor Settings

Tab	Description
Protocols	Web Filter monitors the following protocols and associated ports by default: • **HTTP**: 3128, 80, 8000, 8080 • **BitTorrent**: 6881 - 6999 • **EDonkey**: 4661, 4662 • **EZPeer**: 8870 • **FastTrack (Kazaa)**: 1214 • **FTP**: 20, 21 • **Gnutella**: 6346, 6347 • **Gopher**: 70 • **Hotline Connect**: 5500 - 5503 • **HTTPS**: 443, 8443 • **IRC**: 6660 - 6669 • **Jabber/SIMP**: 7467 • **Jabber/XMPP**: 5222 - 5224 • **Liquid Audio**: 18888 • **MSN Messenger**: 1863 • **NNTP**: 119 • **Oscar (AIM/ICQ)**: 5190 • **PNM/PNA**: 7070 • **RTSP**: 554, 8554 • **Skype**: 33033 • **Windows Media**: 1755 • **WinMX**: 6699 • **Yahoo! Messenger**: 5050 You can add new protocols and add new ports to existing protocols as you require, see "Adding New Protocols And Ports" on page 40 for more details.
Unmonitored Destinations	You can exclude destinations (including domains) from being monitored. See "Unmonitoring Destinations or Users" on page 41 for more details.
Unmonitored Users	You can exclude individual users or a whole domain from being monitored. See "Unmonitoring Destinations or Users" on page 41 for more details.

Table 2-2 List of File Types

File Type Group	File Extensions Monitored
Audio Files	aac, aif, aifc, aiff, au, cda, m3u, m4p, mid, midi, mp3, ogg, rmi, snd, wav, wax, wma.
Compressed Files	ace, arc, arj, b64, bhx, cab, gz, gzip, hqx, iso, jar, lzh, mim, rar, tar, taz, tgz, tz, uu, uue, xxe, z, zip.
Documents	csv, doc, docx, dot, pdf, ppt, pptx, ps, rtf, txt, xls, xlsx.
Executables	bat, cfc, cmd, com, dll, exe, jse, ocx, xpi.
Feeds	opml, rdf, rss, rss2, xml.
Images	bmp, gif, jfif, jpe, jpeg, jpg, pcx, png, psd, tif, tiff, wmf.
Scripting	cgi, js, php, pl, py, vb, vbe, vbs.
Video Files	asf, asx, avi, divx, ivf, mlv, mov, mp2, mp2v, mpa, mpe, mpeg, mpg, mpv2, qt, ra, ram, rm, swf, wm, wmd, wmp, wmv, wmx, wvx, wxv.
Web Pages	asp, aspx, css, htm, html, jsp, mspx, shtml, stm.

MORE INFORMATION

For further details on the Monitored Data settings, see Chapter 6.

BASIC RULE CONFIGURATION

SurfControl Web Filter uses rules, which you can use to apply your Acceptable Use Policy to your users.

There are three types of rules:

- **Allow** - Uses positive filtering to give access. This is the default setting for any new rule you create.
- **Disallow** - Uses negative filtering to deny access.
- **Allowance** - Uses a combination of positive and negative filtering to set up limits for internet access. The allowance value can either be time based (allowing access for a predefined time limit), or value based (allowing only a predefined amount of bandwidth to be consumed). Once these limits have been reached, access is blocked.

Rules are created and activated from the **Rules Administrator**, which you can access via the **Web Filter Manager > Content Protection** option for your collector or database, or from the **Start > All Programs > SurfControl Web Filter** menu. Web Filter rules consist of various objects which can be configured to suit your needs. To help you, the Rules Administrator comes supplied with some preconfigured rules. If you wish to implement any of these rules, all you have to do is activate them. You can do this in the following way from the Rules Administrator interface:

1 Select the check box to the left of the rule you wish to activate, or right-click the rule you want to activate and select **Active** from the right-click menu.

2 Click **Commit** to save the changes to your database.

RECOMMENDATIONS FOR CREATING AND APPLYING RULES

Before building your own rules, consider altering one of the preconfigured rules in the list. To examine the rule's objects, select a rule and from the right-click menu, select properties. You can check how the rule objects have been used, and modify the settings for each one. For an in depth description of the various rule objects, see Chapter 7.

When applying rules keep the following in mind:

- Rules are read sequentially and will not be overwritten by a rule that follows. The fewer rules you have, the more efficiently Web Filter will perform.
- Rules are processed from the top of the list in the Rule Panel downwards. Rules which are applied to individuals or small groups should be placed near the top of the list.
- NEVER set up a "Disallow, Anybody, Anywhere, Anytime" rule because it will block all access throughout your network. It is recommended that you test rules on a single machine before implementing a network-wide policy.
- It is strongly recommended that only one user modifies rules in the Rules Administrator at any one time. This is to prevent any corruption of the database which will cause the Rules Administrator to crash, rendering it inoperable.

SCHEDULING TASKS

When you ran the Configuration Wizard, you were asked to set up two scheduled tasks:

1 Internet Threat Database updates

2 Database Maintenance

These tasks are controlled by the **Scheduler**, accessed from the **Web Filter Manager > Maintenance** option for your database, or from the **Start > All Programs > SurfControl Web Filter** menu. The Scheduler enables you to run certain events at a time when you will have no users logged on to your network, or if an event requires a lot of bandwidth.

You can configure the following events in the Scheduler:

- Command Line
- Database Management
- Database Update
- Internet Threat Database Update
- Network Groups Update

MORE INFORMATION

For more information on configuring the various events, see Chapter 12.

Chapter 3

Remote Administration

Introduction . . . . . page 16
What the Remote Administration Client Does . . . . . page 16
Prerequisites . . . . . page 16

INTRODUCTION

The Remote Administration Client allows you to remotely access the Web Filter server to create reports, design or edit rules, and view the database.

You can install the Remote Administration Client on computers in your network that comply to the minimum requirements specified in the *Starter Guide*. For details on installing the Remote Administration Client, refer to the *Starter Guide*.

WHAT THE REMOTE ADMINISTRATION CLIENT DOES

You can use the Remote Administration Client to access the following Web Filter functions from a different computer:

- **The Web Filter Manager** - View Internet traffic via the **Monitored Data** Navigation tree option.
- **The Rules Administrator** - Create and edit rules.
- **The Web Filter database** - Connect to your database without being at the actual machine.
- **The Real-Time Monitor** - See your Internet traffic in real time.

Note: You cannot use the Remote Administrator to configure the Web Filter service.

PREREQUISITES

For each Computer:

- The Remote Administration Client version of Web Filter must be installed. Refer to the *Starter Guide* for more details.
- From the **Web Filter Manager**, select **Add Server** from the **Tasks** tab. Enter the name of the Web Filter server you want to connect to.
- For reports you will need the client shortcut URL to be able to log in to Report Central. See the SurfControl Report Central *Starter Guide* for more details.

Chapter 4

Licensing

Licensing Web Filter . . . . . page 18

LICENSING WEB FILTER

You can use Web Filter on a trial basis for 30 days. To continue to use the full functionality of the product past the trial period, including updating the Internet Threat Database, you must contact SurfControl to obtain an appropriate license for your user count. For more details on obtaining a license, visit www.surfcontrol.com

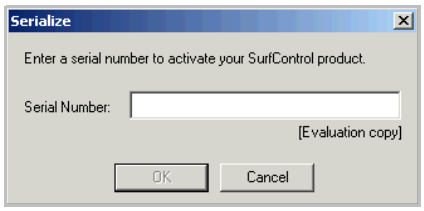
ENTERING A WEB FILTER LICENSE KEY

To license your Web Filter product:

1 Obtain a Web Filter license serial number from SurfControl.

2 Right-click the SurfControl icon in the notification area of the taskbar. From the menu, select **About**. The About SurfControl dialog box will appear.

3 Click **Serialize**. The Serialize dialog box will appear. Enter the Serial Number obtained from SurfControl in the field. Click **OK**.



The next time you view the **About** dialog box, you will see your serial number and user license details. This dialog box also holds information on the latest Internet Threat Database installed, as well as the number of days your subscription has left. When you purchase a license for Web Filter, a one year subscription to Internet Threat Database updates is included. A reminder e-mail will be sent to the Systems Administrator when this subscription is due for renewal.

Chapter 5

Privacy Edition

What It Does . . . . . page 20
Privacy Edition Features . . . . . page 22

WHAT IT DOES

In certain European countries, laws have been passed which prohibit the use of monitoring software to check user browsing details, unless express permission has been given by a manager and a union representative.

COMPARING THE STANDARD AND PRIVACY EDITIONS

The tables below outline the differences between Web Filter Standard and Privacy Editions of SurfControl Web Filter.

Table 5-1 Web Filter Manager

Item	Action	Standard Edition	Privacy Edition
User Menu	Rename User	Yes	No
Right-Click User Menu	Get Friendly Name	Yes	No
	Get User Name	Yes	No
	View User Detail	No	Yes
Monitored Data Tasks	Change Manager Password	No	Yes
	Change Union Password	No	Yes

Table 5-2 Real-Time Monitor

Item	Action	Standard Edition	Privacy Edition
Options Menu	User	Yes	Unavailable
	Client Name	Yes	Unavailable
	Client IP Address	Yes	Unavailable

Table 5-3 SRC Reports

Item	Type	Standard Edition	Privacy Edition
Quick Reports	Top N Workstations by Connections	Yes	No
Summary Reports	Top N Workstations by Connections	No	Yes

For further information about available Reports, see the SurfControl Report Central *Administrator's Guide*.

PRIVACY EDITION FEATURES

Viewing users details requires the permission of a manager and a union representative. The Privacy Edition is supplied with a preconfigured password of ‘admin’, for both the manager and union representative. SurfControl recommends that the designated manager and union representative change their password as soon as possible after installation.

CHANGE THE MANAGER AND UNION PASSWORDS

To change the passwords:

1 From the **Web Filter Manager > Monitored Data**, select **Change Manager** or **Change Union Password** from the **Tasks** tab.

2 Enter the old password (‘admin’ for the original password).

3 Enter a new password. This can be up to 40 characters long and can be alpha, numeric or a combination of both.

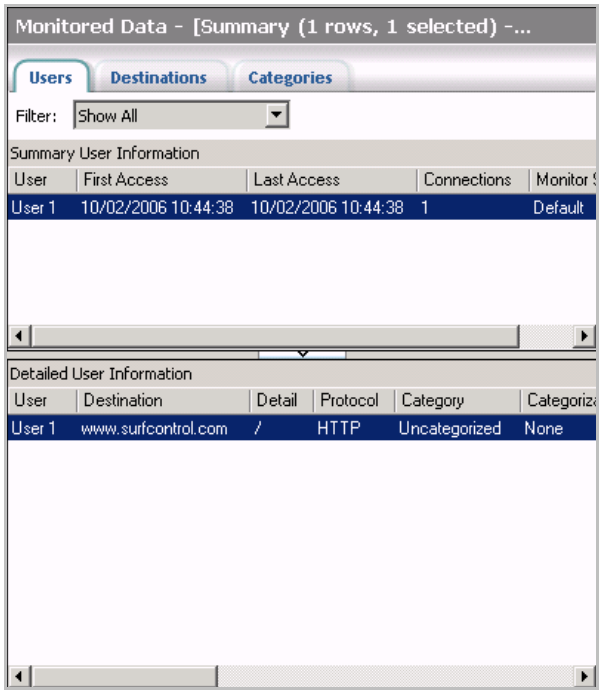
4 Verify the password by re-entering it.

5 Click **OK** to set the password.

VIEWING USER DETAILS

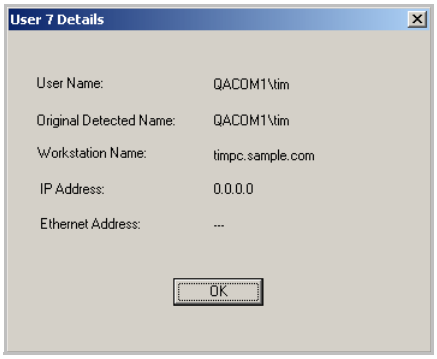
The Monitored Data shows users in the format ‘User X’ as shown in the figure below:

Figure 5-1 Privacy Edition Monitored Users



To view a user's details:

1 Select a user in the **Summary User Information** panel.
2 From the **Monitored Users Tasks**, select **View User Details**.
3 Have the Manager enter their password.
4 Have the union representative enter their password.
5 Click **OK**.
6 The following details are then displayed in a dialog box:.



- User Name
- Original Detected Name
- Workstation Name
- IP Address
- Ethernet Address

7 Click **OK** to close the dialog box.

5 PRIVACY EDITION

Privacy Edition Features

Chapter 6

The Web Filter Manager

Introduction . . . . . page 26
Working With the Web Filter Manager . . . . . page 27
SurfControl Web Filter . . . . . page 30
Web Filter Server . . . . . page 32
Monitored Data . . . . . page 34
Users . . . . . page 36
Destinations . . . . . page 45
Categories . . . . . page 49
Content Protection . . . . . page 52
Maintenance . . . . . page 53

INTRODUCTION

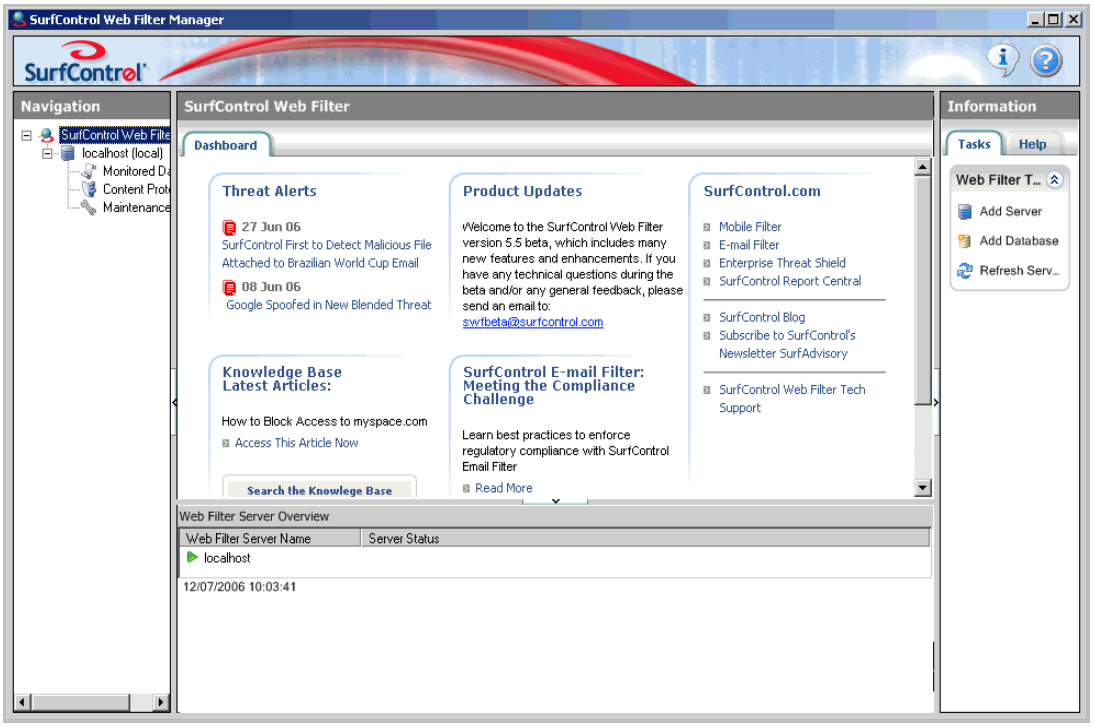
The SurfControl Web Filter Manager:

- Shows the Servers and databases you are monitoring with Web Filter.
- Displays the historic Internet activity of users.
- Helps you configure how Web Filter manages Internet threats.
- Helps you maintain Web Filter to ensure it performs efficiently.

OPENING THE WEB FILTER MANAGER

Select **Web Filter Manager** From the **Start > All Programs > SurfControl Web Filter** menu.

Figure 6-1 Web Filter Manager



WORKING WITH THE WEB FILTER MANAGER

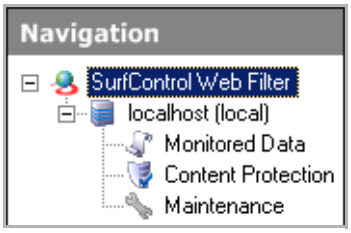
The Web Filter Manager screen is divided into 3 columns:

- **Navigation pane** - This displays the server and database connections you have made with Web Filter.
- **Central pane** - Displays the item selected in the navigation pane.
- **Information pane** - This displays tasks and help for the item selected in the navigation pane.

THE NAVIGATION PANE

The Navigation pane displays the servers and databases that Web Filter is connected to.

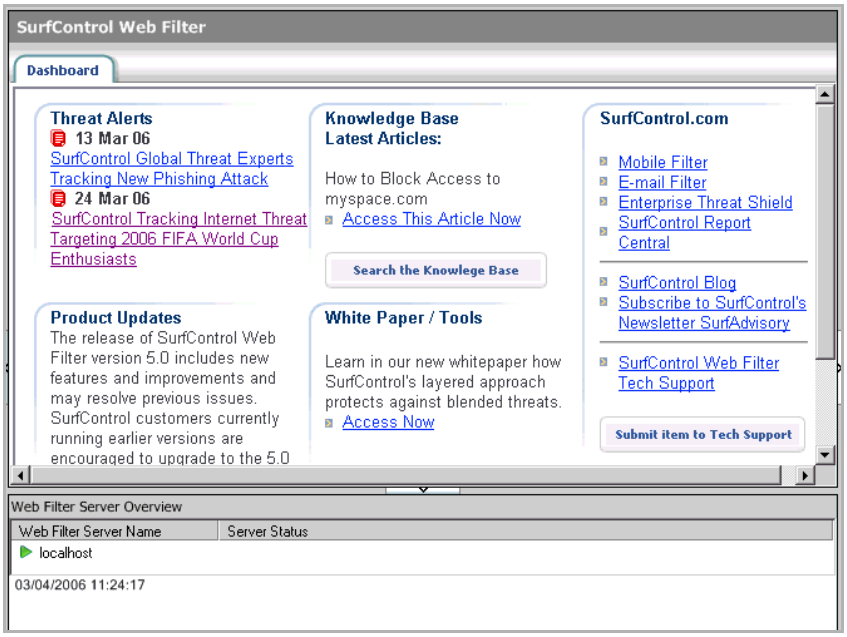
Figure 6-2 Navigation Pane



THE CENTRAL PANE

Depending on the option selected in the navigation pane, information about your Web Filter installation will be displayed in the central pane.

Figure 6-3 Web Filter Manager Dashboard

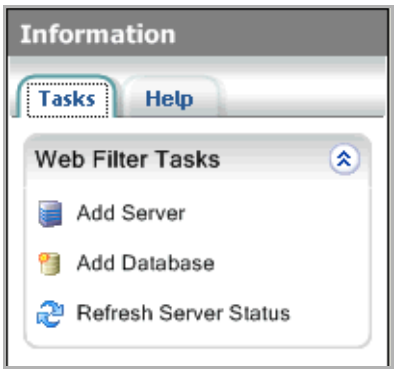

SurfControl Web Filter
Dashboard
Threat Alerts
13 Mar 06
SurfControl Global Threat Experts Tracking New Phishing Attack
24 Mar 06
SurfControl Tracking Internet Threat Targeting 2006 FIFA World Cup Enthusiasts
Knowledge Base Latest Articles:
How to Block Access to myspace.com
Access This Article Now
Search the Knowlege Base
SurfControl.com
Mobile Filter
E-mail Filter
Enterprise Threat Shield
SurfControl Report Central
SurfControl Blog
Subscribe to SurfControl's Newsletter SurfAdvisory
SurfControl Web Filter Tech Support
Submit item to Tech Support
Product Updates
The release of SurfControl Web Filter version 5.0 includes new features and improvements and may resolve previous issues. SurfControl customers currently running earlier versions are encouraged to upgrade to the 5.0
White Paper / Tools
Learn in our new whitepaper how SurfControl's layered approach protects against blended threats.
Access Now
Web Filter Server Overview
Web Filter Server Name
Server Status
localhost
03/04/2006 11:24:17

THE INFORMATION PANE

The information pane consists of two tabs:

- **Tasks** - A list of tasks that can be performed, depending on the item selected in the navigation pane.
- **Help** - User assistance for the tasks available.

Figure 6-4 Information Pane



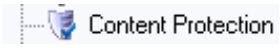
What Can Be Seen

The data in the central pane will change depending on what you have selected in the navigation pane. The following table shows what will be displayed and when:

Table 6-1 Web Filter Manager Navigation items

Navigation tree item	Data viewed	Tasks
SurfControl Web Filter The default view of the Web Filter Manager.	• SurfControl Web Filter Dashboard • Server Overview	• Add Server • Add Database • Refresh Server Status
For more details on the information displayed and tasks at this level. ("SurfControl Web Filter" on page 30)		
coqadell109 (local) This is the server that you set up in the Configuration Wizard during the installation of Web Filter.	• Service Status • Server Info • Database Status	• Remove Server • Start or Stop Web Filter Service • Start or Stop Scheduler Service • Start or Stop VCA Service • Refresh Database
For more details on the information displayed and tasks at this level. ("Web Filter Server" on page 32)		
Monitored Data	• Users tab • Destinations tab • Categories tab	• Monitored Data tasks • Monitored Users tasks • Monitored Connections tasks • Print Destinations/Categories

Table 6-1 Web Filter Manager Navigation items

Navigation tree item	Data viewed	Tasks
For more details on the information displayed and tasks at this level. ("Monitored Data" on page 34)		
	• Rules Administrator • Real-Time Monitor • Custom Categorization	
For more details on the Content Protection tools. ("Content Protection" on page 52)		
	• Web Filter Settings • Database Management • Virtual Control Agent Settings • Database Updater • Scheduler	
For more details on the Maintenance tools. ("Maintenance" on page 53)		

SURFCONTROL WEB FILTER

This is the default view when you open the Web Filter Manager.

DATA DISPLAYED

In the central pane you will see the following information:

- The Web Filter Dashboard
- The Web Filter Server Overview

Web Filter Dashboard

The dashboard is a central place for obtaining further information and advice about Web Filter. You can access documentation about the following:

- Threat alerts
- Knowledge Base articles
- Information on other SurfControl products
- Product upgrades
- White papers and tools
- Access and raise tickets with Technical Support

Web Filter Server Overview

This shows which servers you have Web Filter installed on, and their current status.

TASKS

From the SurfControl Web Filter Dashboard view, you can import and analyse the monitored data from multiple Web Filter servers and databases, by adding them from the Tasks pane.

Add Server (if you are running a multi-collector environment)

If you wish to install Web Filter on more than one machine, for instance to monitor specific areas of your network, you need to add the server to your Web Filter Manager. See the Network Considerations chapter of the *Starter Guide* for more details about installing Web Filter on your network.

To add a new server to the Web Filter Manager:

1 Select the **SurfControl Web Filter** item in the Navigation pane tree.

2 From the Tasks pane select **Add Server**.

3 In the **Add Server** dialog box, enter either the name or IP address of the server you want to add.

4 Click **OK**.

5 The server should be visible in the **Navigation** tree.

Add Database

To add a new database to an existing server:

1 Select the **SurfControl Web Filter** item in the Navigation pane tree.

2 From the Tasks pane select **Add database**.

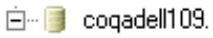
3 In the **Add Database** dialog box, enter the name or IP address in the **Server** text box.

4 Use either the **Trusted Connection** (selected by default) or enter a valid SQL Server **Login ID** and **Password**.

5 Select an available Web Filter **database** from the **Database** drop-down list box.

6 Click **OK**.

7 The database should be visible under the server **Navigation** tree item.



Refresh Server Status

You can refresh the status of your server at any time.

WEB FILTER SERVER

When you installed SurfControl Web Filter, you set up a server using the Configuration Wizard. This server will appear in the navigation tree under the SurfControl Web Filter item as shown below:

Figure 6-5 Web Filter server

SERVER INFORMATION DASHBOARD

With the server selected, the Server Information Dashboard displays the following information:

Table 6-2 Server Information Dashboard

Section	Data
Service Status	This section displays the status of the following Web Filter services: • Web Filter Service • Scheduler Service • VCA Service
Server Info	This section displays the following information: • Web Filter Platform • Web Filter Version • Last Update Time (for the Internet Threat Database) • User License - Shows the current product license information. • Internet Threat Database - Displays the version number and the number of days remaining for the General List and Search Engine Database for your current subscription.
Database Status	This section displays the following information about your Web Filter database: • Database Server - The name of the server your database is installed on. • Database Name - The name of the Web Filter database. The default name is `SurfControl_WebFilter`. • Destination Count - The number of Internet destinations stored in the database. • User Count - The number of users monitored in your database. • Database size - The current size of your Web Filter database. If using a SQL Server Express database, the Microsoft recommended maximum size is 4GB.

TASKS

From the SurfControl Web Filter Server view, you can perform the following tasks:

- Remove Server
- Stop or Start Web Filter Service
- Stop or Start Scheduler Service
- Stop or Start VCA Service
- Refresh Database

MONITORED DATA

Monitored data is where you see who has been using the internet, the sites they have visited, and the categories those sites have been assigned to in the SurfControl Internet Threat Database.

DATA

The central pane consists of 3 tabs for Monitored Data:

- **Users** - Those employees detected by Web Filter.
- **Destinations** - Where those employees have been visiting on the Internet.
- **Categories** - Destinations visited are categorized, either by the standard categories as supplied by the SurfControl Internet Threat Database, or any custom or manual categories you may create.

How Data is sorted in the Web Filter Manager

In the three Monitored Data tabs, the default view is restricted to the first 5000 entries in the summary panels. If you have less than 5000 entries, these will be automatically sorted on the first column in the row (**User**, **Destination** or **Category**), showing the latest entry at the top.

If you have more than 5000 entries (you will see a caution if you exceed this limit), the first 5000 entries are shown based on the **Last Access** information. To change the default number of rows:

1 Close the **SurfControl Web Filter Manager** application.

2 Locate the file `SurfControl.Application.exe.config`.

In a default installation this is located in `C:\Program Files\SurfControl\Web Filter`.

3 Open `SurfControl.Application.exe.config` with Notepad.

4 Locate the line: `<add key="SurfControl.Plugins.WF.Monitor.DataSetFillCount" value="5000"/>`

5 Change the `value="5000"` setting to the required value.

6 Save the `SurfControl.Application.exe.config` file.

7 Open the **SurfControl Web Filter Manager** application.

Note: Increasing the number of rows may have a significant impact on the performance of the Web Filter server.

FILTERS

Filters are available for all **Monitored Data** tabs. You can filter by the following options:

- Show All (default view)
- Access Date

- Access Time
- Categorization Method
- Category
- Connection Status
- Destination
- Destination IP
- Detail
- Group
- Protocol Name
- Source IP
- Source Workstation
- User Name
- Via Proxy
- Custom Filters

Alternatively you can create your own custom filters from the two pre-configured filters:

- Last 24 Hours
- Last 7 Days

Creating a Custom Filter

To create your own custom filter:

1 From the **Filter** drop-down list box select **Custom Filters > Manage Custom Filters**.

2 Select **New** from the **Custom Filters** dialog box.

3 Enter a name for your filter.

4 Select the option that you want to customize in the left-hand pane.

5 Configure the criteria to suit your needs.

6 Repeat steps 1 to 5 for any additional filters.

7 Click **OK** to save your custom filter.

8 Click **Close** to close the **Custom Filters** dialog box. You can now select your filter from the **Custom Filters** drop-down list box.

9 You can also **Edit** or **Delete** your custom filters from the **Custom Filters > Manage Custom Filters** menu, or when selected with the **Edit** or **Delete** buttons next to the **Filters** drop-down list box.

Note: You can only have one of each criteria type for each custom filter. Once you have created a custom filter, it is available on all the Monitored Data tabs.

USERS

SurfControl Web Filter monitors all users who log on to your network. The Users tab shows various information about users' Internet activity. You can perform tasks, such as assigning users to groups for more meaningful reporting. You can decide what activity you want to monitor and whether you want to exclude any users from having their activity recorded in the database.

The Users pane is split into **Summary** and **Detail** users information.

SUMMARY USER INFORMATION

This pane shows the users monitored by the Web Filter database. The following information is displayed in the columns:

- **User** - Identifies the user's name (in the following order of precedence):
  - Novell user name
  - EUM user name
  - NetBIOS user name
  - Workstation name
  - IP address
- **Last Workstation** - Displays the name of the last workstation the user was monitored on. If the name is not available, the IP Address will be displayed.
- **Last IP Address** - Shows the last IP Address the user was monitored on.
- **First Access** - Shows the date and time Web Filter first logged Internet activity from this user.
- **Last Access** - Displays the date and time Web Filter last logged Internet activity from this user.
- **Connections** - Shows the total number of TCP (Transmission Control Protocol) transactions a user has received from the Internet.
- **Monitor Setting** - Shows the file type monitoring setting. The installed **Default** setting monitors Web page traffic only.

DETAIL USER INFORMATION

When you select a user in the summary pane, details of their monitored activity are shown in the bottom pane. The following information is displayed:

- **User** - Identifies the user's name (in the following order of precedence):
  - Novell user name
  - EUM user name
  - NetBIOS user name
  - Workstation name
  - IP address

- **Destination** - The Internet address accessed. This is the domain level address, for example www.mysite.com.
- **Detail** - Shows any page level detail of the Internet request, for example www.mysite.com/morestuff.htm. By default, Internet requests with a connection status of **Allowed** will not show any detail information. Requests with a status of **Blocked** will show page level detail. See "The Default Monitor Settings" on page 9 for more details.
- **Via Proxy** - Shows if the connection to the destination was made via a proxy server.
- **Source Workstation** - The workstation from where the Internet request was made.
- **Protocol** - The protocol of the Internet request.
- **Category** - The category assigned to the request.
- **Categorization Method** - The various sources of categorization are as follows:
  - **Company & Intranet** - The destination is specified within the **Categorization** tab of the Web Filter settings as a company domain or Intranet site. See "Categorization" on page 106 for more details.
  - **Manual** - The administrator has manually set the category of the site. The category could have been set to one of the SurfControl defined categories or a custom category. See "Category Object" on page 67 for more details.
  - **SurfControl** - The site was categorized from the SurfControl Internet Threat Database.
  - **VCA** - The site was categorized by the Virtual Control Agent.
  - **None** - A category was not assigned to the site.
- **Connection Status** - The destination can have one of the following statuses:
  - **Allowed** - Web Filter allowed the user to visit the destination.
  - **Blocked** - Web Filter stopped the user visiting the destination.
- **Access Time** - The date and time the Internet request was made.
- **Connection Duration** - The duration of the request in minutes.
- **Data Sent** - The number of kilobytes sent as part of the Internet request. Any request larger than 2GB will be shown as >2GB.
- **Data Recvd** - The number of kilobytes received as part of the Internet request. Any request larger than 2GB will be shown as >2GB.

TASKS

The following user tasks can be performed from the Information pane:

Table 6-3 Users tab Tasks

Section	Tasks
Monitored Data **Note:** Monitored Data tasks are available across all the Monitored Data tabs.	• Monitor Settings (page 39) • Refresh (page 41) • Change Manager Password (Privacy Edition only) (page 22) • Change Union Password (Privacy Edition only) (page 22)
Monitored Users	• Print (page 41) • Rename User (page 42) • Get Friendly Name (page 42) • Get User Name (page 42) • Change Groups (page 42) • Monitor Settings for Users (page 43) • Delete User(s) (page 42) • View User Details (Privacy Edition only) (page 22)
Monitored Connections **Note:** Monitored Connections tasks are available across all the Monitored Data tabs.	See Table 6-5 on page 44 for the following tasks: • Print • Go To Site • Go To Page • Set Category • Copy URL

MONITORED DATA TASKS

Update Configuration

After performing certain tasks, the following message will appear at the top of the Monitored Data screen. The servers connected to the database you are making changes to, will require updating after the following tasks:

- Monitor Settings
- Set Category

Monitor Settings

The default Monitor Settings are described in the Basic Configuration chapter. See "Initial Monitored Data Settings" on page 9 for more details. You can change or add to the following settings:

- Create new File Type groups to monitor. See below for more details.
- Add new protocols and ports. See page 40 for more details.
- Exclude destinations from being monitored. See page 41 for more details.
- Exclude users from being monitored. See page 41 for more details.

Note: Any changes made to the Monitored Data settings only affect data from that point onwards, it does not affect historic data.

Create New File Type Groups

You can create custom file type groups to complement the ones supplied with Web Filter.

To create your own file type groups:

1 Select **Monitor Settings** from the **Monitored Data** section.
2 Select the **File Types** tab from the **Monitor Settings** window.
3 Click **New Group**.
4 Add a name for your new group in the box that displays under **All Custom File Types**.
5 Press **Enter**.
6 Click **New Extension**.
7 Add the new file extension (minus the preceding '.') in the box that displays below your new group name.
8 Press **Enter**.
9 Repeat steps 6 to 8 for any additional file extensions.
10 Select your new group to start monitoring the file types you have specified.

11 Click **Apply**, then **OK** to close the **Monitor Settings** dialog box.

12 Click **Update Configuration** to update servers connected to the database.

Note: A file extension can only exist in one file type group. An error message is displayed if the extension already exists in another group.

Your new group can also be applied to individual users or groups from the **Monitor Settings** in the **Monitored Users** section of the Information pane. See "Monitor Settings for Users" on page 43 for more details.

Adding New Protocols And Ports

You can add new protocols and their associated port numbers to Web Filter, to allow more flexiblility when filtering network traffic. You can also add or edit port numbers for existing protocols.

To add new protocols and ports:

1 Select **Monitor Settings** from the **Monitored Data** section.

2 From the **Protocols** tab, click **New**.

3 Enter a name for the Protocol.

4 Set the Status for the Protocol. The options are **Monitored** or **Unmonitored**.

5 In the **Protocol Ports** section, click **New Port**.

6 Enter a number for the port associated with the protocol (this must be between 1 and 65535).

7 Press **Enter**.

8 Repeat as necessary for additional ports.

9 Click **OK** to close the **New Protocol** dialog box.

10 Click **Apply**, then **OK** to close the **Monitor Settings** dialog box.

11 Click **Update Configuration** to update servers connected to the database.

To edit ports for existing protocols:

1 Select **Monitor Settings** from the **Monitored Data** section.

2 Select the protocol and click **Edit**.

3 Click **New Port**.

4 Enter the new port number (this must be between 1 and 65535).

5 Click **OK** to close the **New Protocol** dialog box.

6 Click **Apply**, then **OK** to close the **Monitor Settings** dialog box.

7 Click **Update Configuration** to update servers connected to the database.

Unmonitoring Destinations or Users

Unmonitoring users or destinations is useful when you want Web Filter to ignore specific destinations, or the browsing behaviour of particular users. For example, destinations that are categorized as 'Company & Intranet' may be heavily browsed, and as a result, may not require monitoring.

To prevent a destination being monitored:

1 Select **Monitor Settings** from the **Monitored Data** section.

2 From the **Unmonitored Destinations** tab, click **New**. You can add the following data:

- **URLs** - The address of the Web Site being accessed.
- **IP addresses** - If a destination is being accessed by this method instead of its URL.

3 Click **Apply**, then **OK** to close the **Monitor Settings** dialog box.

4 Click **Update Configuration** to update servers connected to the database.

Note: When entering IP addresses, do not include the http:// prefix. If this is added the destination will still be monitored. Wildcard entries, for example; *.yourcompany.* will ignore all your corporate Web sites. When a destination is unmonitored, it can still be filtered (blocked or allowed) by rules.

To prevent a user or a domain being monitored:

1 From the **Unmonitored Users** tab, click **New**.

2 Enter the **network name** for the **user**. Wildcard entries can be used. For example to add a whole domain enter YOURDOMAIN*.

3 Click **Apply**, then **OK** to close the **Monitor Settings** dialog box

4 Click **Update Configuration** to update servers connected to the database.

Note: Unmonitored users do not have their data recorded to the database. However, they are still checked by the Anti-Virus Agent and filtered by any rules that you have in place.

Refresh

Refresh updates the summary and detailed user information in the Monitored Data panes as it is added to the database.

MONITORED USERS TASKS

As well as being available from the Information pane, you can access the Monitored Users tasks by right-clicking a selected user.

Print

You can print the information shown for a selected user.

Rename User

This option allows you to rename a user in the Web Filter database. In the dialog box that displays, enter a name in the **New name** text box. The original information about the user is also listed.

Note: If a duplicate name is detected during a database update, a modified name insertion will be attempted in the following format: “Friendly Name (domain\some.user)”. If this fails a second time, the name is not added.

Get Friendly Name

Displays the network name of the user, as entered by the System Administrator.

Get User Name

Shows the domain name of the user. For example: domain1\user1.

Change Groups

Web Filter creates a default group of **Everybody** when you install it. All users detected by Web Filter are automatically assigned to this group. You can create groups to more accurately reflect the departments in your organization (sales, accounts, administration, etc.), and assign users to them. This can help when running reports in SurfControl Report Central and setting up rules.

To set up groups and assign users to them:

1 Select one or more users in the **Summary User Information** pane.

2 Click **Change Groups**.

3 Check that the group has not been created in the **Available Groups** pane from the **SurfControl Groups** tab.

4 Click **New**.

5 Enter the name for your new group and click **Enter**.

6 Click **Add**. Your new group will be shown in the **Group Membership** pane. Your selected users are now added to this group.

7 Click **OK** to close the **Change Groups** dialog box.

Note: Network Groups are updated during the update of the Web Filter database or by a scheduled event. See "Available Events" on page 142. For more details on network group updates please see Knowledge Base article 1467. You cannot change the Network group for a user from the Network Groups tab.

Delete User(s)

Perform this task if you want to remove specific users from the Users tab in Web Filter Manager. This is advantageous if workstation names have been recorded rather than user names. After completing this task, the user(s) will not be shown in the Web Filter Manager, but they will still exist in the database until the next database purge.

1 Select one or multiple users in the **Summary User Information** pane.

2 Click **Delete User(s)** in the **Monitored Users Tasks** box, or right-click the selected user(s) and click **Delete User(s)** from the menu.

3 Click **Yes** to confirm deletion or click **No** to cancel.

The user has now been removed from the Web Filter Manager. For further instructions on purging the database, see Chapter 11 "Purge" on page 130.

Monitor Settings for Users

You can select which file types a user can be monitored for from the Monitor settings. Any custom file type groups you create will also be available.

Table 6-4 User Monitoring Options

Option	Description
Unmonitor	The user's Internet activity is not monitored.
Monitor default file types	Only the default file types (certain Web page types) are monitored. See "Monitor Settings" on page 39 for details on default file types.
Monitor custom file types	You can choose which file types you want to monitor for selected users. See "The Default Monitor Settings" on page 9 for details of the supplied file type groups. **Note:** Monitoring too many File Types can impact on the performance of Web Filter. If you suspect a certain file type is being accessed significantly, select the file type and monitor it for a set period of time.

MONITORED CONNECTIONS TASKS

The following tasks are available from the Monitored Connections tasks section. Monitored Connections tasks are also available, by right-clicking the detailed user Information entry for a selected user.

Table 6-5 Monitored Connections Tasks

Task	Description
Print	Prints a selected Detailed User Information entry.
Go to Site	Opens up a selected entry at the domain level in a Web browser.
Go to Page	Opens up a selected entry at the individual page level in a Web browser
Set Category	You can change the category for a selected entry. **Note:** Any changes to a category assigned to a destination seen in the Monitored Data section will only affect future connections. Data already saved to the database cannot be changed, as this is a historical record of the category assigned at the time the destination was visited. You need to click **Update Configuration** to apply any changes made to categories.
Copy URL	Copies the URL to the Windows clipboard.

DESTINATIONS

SurfControl Web Filter stores information about the destinations visited by your users. You can view these destinations on the Destinations tab, and perform some of the following tasks:

- Categorize a destination
- Submit uncategorized destinations to SurfControl for inclusion in the Internet Threat Database.

The Destinations pane is split into **Summary** and **Detail** destination information.

SUMMARY DESTINATION INFORMATION

This pane shows the destinations monitored by the Web Filter database. The following information is displayed in the columns:

- **Destination** - Identifies the domain level Web site address as detected by Web Filter.
- **Destination IP** - Shows the IP address of the domain level entry.
- **First Access** - Shows the date and time Web Filter first saw the Web site entry.
- **Last Access** - Shows the date and time Web Filter last saw the Web site entry.
- **Connections** - Shows the total number of TCP (Transmission Control Protocol) transactions made to the Web site entry.

DETAIL DESTINATION INFORMATION

When you select a destination in the summary pane, the detailed destination information is shown in the bottom pane. The following information is displayed in the columns:

- **User** - Identifies the user's name in the following order of precedence:
  - Novell user name
  - EUM user name
  - NetBIOS user name
  - Workstation name
  - IP address
- **Destination** - The Internet address accessed. This is the domain level address, for example www.mysite.com.
- **Detail** - Shows any page level detail of the Internet request, for example www.mysite.com/morestuff.htm. By default, allowed Internet requests will not show any detailed information. Requests that are blocked will show page level detail. See "Initial Monitored Data Settings" on page 4.
- **Via Proxy -** Shows whether the connection to the destination was made via a proxy server.
- **Source Workstation** - The workstation from where the Internet request was made.
- **Protocol** - The communication protocol of the Internet request.
- **Category** - Shows the SurfControl Internet Threat Database category for the Web site entry.

- **Categorization Method** - The various sources of categorization are as follows:
  - **Company & Intranet** - The destination is specified within the **Categorization** tab of the Web Filter settings as a company domain or Intranet site. See "Categorization Tab" on page 106 for more details.
  - **Manual** - The administrator has manually set the category of the site. The category could have been set to one of the SurfControl defined categories or a custom category. See "Category Object" on page 67 for more details.
  - **SurfControl** - The site was categorized from the SurfControl Internet Threat Database.
  - **VCA** - The site was categorized by the Virtual Control Agent.
  - **None** - The site was not assigned a category.
- **Connection Status** - The destination can have one of the following statuses:
  - **Allowed** - Web Filter allowed the user to visit the destination.
  - **Blocked** - Web Filter stopped the user visiting the destination.
- **Access Time** - The date and time the Internet request was made.
- **Connection Duration** - The duration of the request in minutes.
- **Data Sent** - The number of kilobytes sent as part of the Internet request. Any request larger than 2GB will be shown as >2GB.
- **Data Recvd** - The number of kilobytes received as part of the Internet request. Any request larger than 2GB will be shown as >2GB.

TASKS

The following tasks can be performed from the Information pane.

Table 6-6 Destinations Tab Tasks

Section	Tasks
Monitored Data. Monitored Data tasks are available across all the Monitored Data tabs.	• Monitor Settings (page 39) • Refresh (page 41)
Monitored Destinations	• Print (page 47) • Unmonitor (page 47) • Go To Site (page 47) • Submit Destination (page 47) • Set Category (page 48)
Monitored Connections. Monitored Connections tasks are available across all the Monitored Data tabs.	See Table 6-5 on page 44 for the following tasks: • Print • Go To Site • Go To Page • Set Category • Copy URL

MONITORED DESTINATIONS TASKS

As well as being available from the Information pane, you can access the Monitored Destinations tasks by right-clicking a selected destination.

Print

You can print all the information shown in the **Summary Destination Information** pane.

Unmonitor

You can stop future requests to visit a selected site being recorded in the Web Filter database.

Go To Site

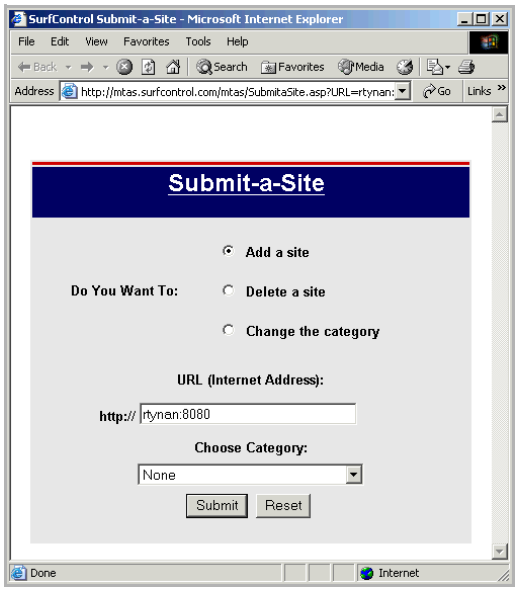
You can open up a selected entry at the domain level in a Web browser.

Submit Destination

If you see a monitored destination that you feel should be included in the SurfControl Internet Threat Database, or should be categorized differently, you can submit the details to SurfControl. To submit a destination:

1 Select the destination in either the **Destination Summary or Detail information** pane.

2 Select **Submit Destination** from the **Monitored Destinations** tasks section. The **Submit-a-Site** Web page will be displayed in a browser window:



The selected site will appear in the **URL (Internet Address)** field.

3 Select what you want to do with the site. You can either:

- **Add a site** - Submit the site to be included in the Internet Threat Database.
- **Delete a site** - Submit the site to be removed from the Internet Threat Database.

- **Change the category** - Select a new category for the site in the Internet Threat Database.

4 If you want to change the category of the site, select which category you want the site to be changed to from the **Choose Category** drop-down list box.

5 Click **Submit**.

Set Category

You can change the category for a selected entry in the Destinations tab. Any changes made to the destination's category, will only affect future connections. Data already saved to the database cannot be changed, as this is a historical record of the category assigned at the time the destination was visited.

You need to click **Update Configuration** to apply any changes to servers connected to the database.

CATEGORIES

SurfControl Web Filter uses its Internet Threat Database to categorize the destinations saved in your database. You can view the destinations grouped by category on this tab. You can use the categories seen to construct rules for your organization. For more details on the Internet Threat Database and categories, visit www.surfcontrol.com.

The Categories pane is split into **Summary** and **Detail** category information.

SUMMARY CATEGORY INFORMATION

This pane displays the categories monitored by the Web Filter database. You can also see the following information displayed in the columns.

- **Category** - Shows the SurfControl Internet Threat Database category for the destination.
- **First Access** - Shows the date and time Web Filter first logged the destination.
- **Last Access** - Shows the date and time Web Filter last logged the destination.
- **Connections** - Shows the total number of TCP (Transmission Control Protocol) transactions made to the destination.

DETAIL CATEGORY INFORMATION

When you select a category in the summary pane, the detailed category information is displayed in the bottom pane. The following information is displayed in the columns:

- **User** - Identifies the user's name in the following order of precedence:
  - Novell user name
  - EUM user name
  - NetBIOS user name
  - Workstation name
  - IP address
- **Destination** - The Internet address accessed. This is the domain level address, for example www.mysite.com.
- **Detail** - Shows any page level detail of the Internet request, for example www.mysite.com/morestuff.htm. By default, Internet requests with a connection status of allowed will not show any detail information. Requests that are blocked will show page level detail. See the **Monitor Settings > General** tab description in Table 2-1 on page 10 for details.
- **Via Proxy** - Shows if the connection to the destination was made via a proxy server.
- **Source Workstation** - The workstation from where the Internet request was made.
- **Protocol** - The protocol of the Internet request.
- **Category** - The category assigned to the request.

- **Categorization Method** - The various sources of categorization are as follows:
  - **Company & Intranet** - The destination is specified within the **Categorization** tab of the Web Filter settings as a company domain or Intranet site. See "Categorization Tab" on page 106 for more details.
  - **Manual** - The administrator has manually set the category of the site. The category could have been set to one of the SurfControl defined categories or a custom category. See "Category Object" on page 67 for more details.
  - **SurfControl** - The site was categorized from the SurfControl Internet Threat Database.
  - **VCA** - The site was categorized by the Virtual Control Agent.
  - **None** - A category was not assigned to the site.
- **Connection Status** - The destination can have one of the following statuses:
  - **Allowed** - Web Filter allowed the user to visit the destination.
  - **Blocked** - Web Filter stopped the user visiting the destination.
- **Access Time** - The date and time the Internet request was made.
- **Connection Duration** - The duration of the request in minutes.
- **Data Sent** - The number of kilobytes sent as part of the Internet request. Any request larger than 2GB will be shown as >2GB.
- **Data Recvd** - The number of kilobytes received as part of the Internet request. Any request larger than 2GB will be shown as >2GB.

TASKS

The following tasks can be performed from the Information pane.

Table 6-7 Destinations tab Tasks

Section	Tasks
Monitored Data. Monitored Data tasks are available across all the Monitored Data tabs.	• Monitor Settings (page 39) • Refresh (page 41)
Monitored Categories	• Print (page 51)
Monitored Connections. Monitored Connections tasks are available across all the Monitored Data tabs.	See Table 6-5 on page 44 for the following tasks: • Print • Go To Site • Go To Page • Set Category • Copy URL

CATEGORIES TASKS

As well as being available from the Information pane, you can access the Categories tasks by right-clicking a selected category.

Print

You can print the information for a selected category.

CONTENT PROTECTION

SurfControl Web Filter has a number of tools to help you manage Internet threats, as illustrated below:

Figure 6-6 Content Protection tab

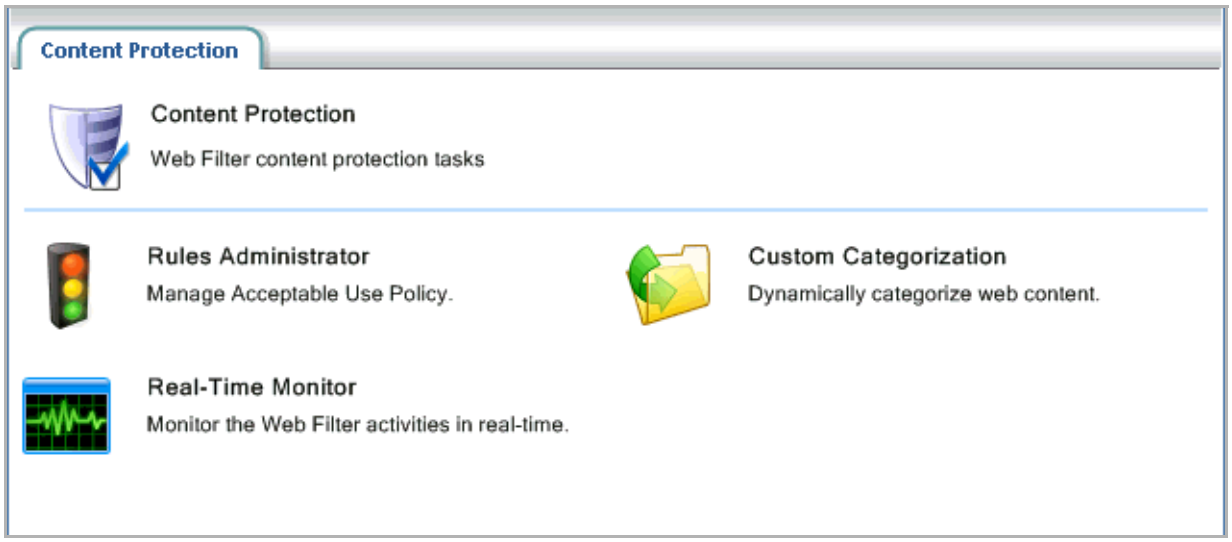


Table 6-8 Web Filter Content Protection Tools

Tool	Description
Rules Administrator	You can apply rules to implement your Acceptable Use Policy. For more details about the Rules Administrator, see Chapter 7.
Real-Time Monitor	You can see the Internet traffic being generated by your users as it happens. For more details about the Real-Time Monitor, see Chapter 8.
Custom Categorization	You can classify destinations that have yet to be assigned to a category in the Internet Threat Database. For more details about Custom Categorization, see Chapter 10.

MAINTENANCE

To help continue Web Filter's effective performance, the following tools are available on the Maintenance tab:

Figure 6-7 Maintenance tab

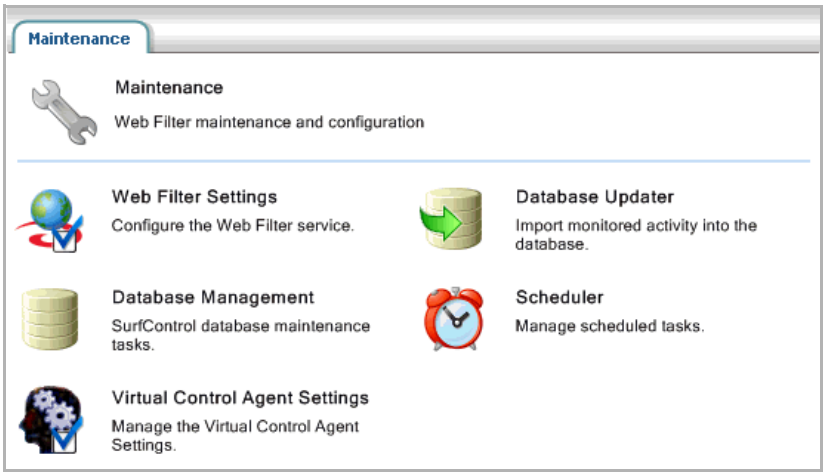


Table 6-9 Web Filter Maintenance Tools

Tool	Description
Web Filter Settings	You can configure how SurfControl Web Filter monitors Internet traffic and actions that it performs when blocking access to sites. For more details about the Web Filter settings, see Chapter 9.
Virtual Control Agent Settings	You can configure the VCA Service settings with this tool. For more details about the VCA Service Settings, see Chapter 10. **Note:** The VCA Service is only available for licensed copies of Web Filter. You can still use the standalone version of the VCA (via Custom Categorization) during the 30 day trial period.
Database Management	You can perform the following database management tasks from this tool: • Archive • Purge • Compact • Delete • Restore For more details about the Database Management tool, see Chapter 11.
Database Updater	You can configure how you update your database from the flat files created by Web Filter. For more details about the Database Updater, see Chapter 11.
Scheduler	You can configure various events to run at times you specify with this tool. For more details about the Scheduler, see Chapter 12.

Chapter 7

Rules Administrator

Introduction . . . . . page 56
Rule Objects. . . . . page 59
Who Objects. . . . . page 60
Where Objects . . . . . page 64
What Objects . . . . . page 70
When Objects. . . . . page 75
Allowance Objects. . . . . page 78
Notify Objects . . . . . page 81
HTTP Deny Page Objects . . . . . page 84
Viewing Another Collector . . . . . page 87

INTRODUCTION

This chapter explains how you use individual objects to build up rules that help you enforce your Acceptable Use Policy. This will enable you to configure rules more accurately and precisely, to meet your organization's requirements. The rule object tabs are only visible if you have selected the default Advanced view in the Rules Administrator. If you cannot see the Object tabs below the Rules panel, select **Advanced** from the **View** menu.

To open the Rules Administrator, from the Web Filter Manager, select **Content Protection > Rules Administrator** from the appropriate collector or database in the **Navigation** tree. The Rules Administrator is also available from the **Start > All Programs > SurfControl Web Filter** menu.

There are three types of rules:

- **Allow** - This is the default setting for any new rule you create which uses positive filtering to give access.
- **Disallow** - This type of rule uses negative filtering to deny access.
- **Allowance** - This rule type uses a combination of positive and negative filtering to set up limits for internet access. The allowance value can either be time based (allowing access for a predefined time limit), or value based (allowing only a predefined amount of bandwidth to be consumed). Once thisthese limits hasve been reached, access is blocked.

GUIDELINES FOR RULE CREATION

For best results, Surfcontrol recommends following these guidelines:

- Place rules to be applied to individual or small groups near the top of the list. This is because rules are processed from the top of the list downwards.
- Use **When** and **Allowance** objects carefully. Use reports such as Protocol Data Analysis or Protocol Time Analysis to narrow down who these rules should apply to, before creating them. See the *SRC Administrators Guide* for more details.
- Keep the number of rules to a minimum, to ensure the maximum efficiency of Web Filter.
- Create, test and activate any global rules you create before creating user or group specific rules.
- Ensure that only one person modifies rules at a time.
- Ensure that the Monitor recognizes user names, to enable user based filtering.
- Ensure auto-categorization is turned on in the Web Filter Service Settings Advanced tab. This is worth checking if a destination specific rule is not working.

Creating Rules

To create a new rule:

1 Select **New** from the **Rule** menu, or click the **New Rule** button.

Note: A new rule is always enabled by default. It will not be active, however, until changes are committed to the database.

2 Choose a **Who** object (if required) and drag and drop the object onto the Who section of the rule.

3 Choose a **Where** object (if required) and drag and drop the object onto the Where section of the rule.

4 Choose a **What** object (if required) and drag and drop the object onto the What section of the rule.

5 Choose a **When** object (if required) and drag and drop the object onto the When section of the rule.

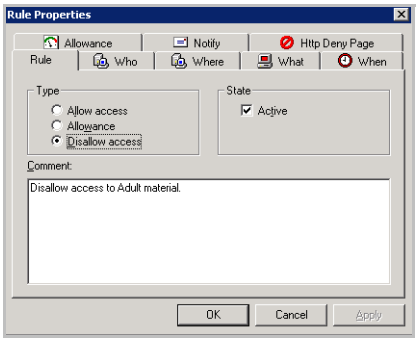
6 Choose an **Allowance** object (if required) and drag and drop the object onto the Allowance section of the rule.

7 Choose a **Notify** object (if required) and drag and drop the object onto the Notify section of the rule.

8 Choose a **HTTP Deny Page** object (if required) and drag and drop the object onto the HTTP Deny Page section of the rule.

9 Right-click the new rule and choose **Properties** from the drop-down menu.

10 You will see the Rule Properties dialog:



Enter a comment for this rule. Adding a comment to a rule enables you to see a description of the rules action in the Rules Administrator and Real-time Monitor, which enables you to see why a rule is blocking a web page. When adding a comment ensure that:

- The description gives a clear indication of what the rule will do.
- The comment is 31 characters in length, or less. Comments exceeding 31 characters will be truncated in the Rules Administrator and Real-time Monitor. The word '(truncated)' will be placed at the end of the comment.

Note: If you do not add a comment to the rule you will see 'N/A' in the Comment columns of Rules Administrator and Real-time Monitor.

11 Move the rule to the appropriate level in the Rule List Panel.

12 **Commit** the changes to enable the rule. New rules are always checked as enabled by default, however the rule will not be active until changes are committed to the database.

13 Test the rule.

14 Make any changes if required.

15 Commit the changes again.

RULE OBJECTS

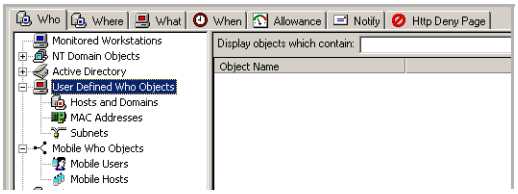
You can create the following Rule objects:

- Who (page 60)
- Where (page 64)
- What (page 70)
- When (page 75)
- Allowance (page 78)
- Notify (page 81)
- HTTP Deny Page (page 84)

Creating a New Rule Object

1 Select a rule object tab:

2 Highlight an individual object component from the left-hand pane below the tabs.



3 In the right-hand pane, right-click and select **New**.

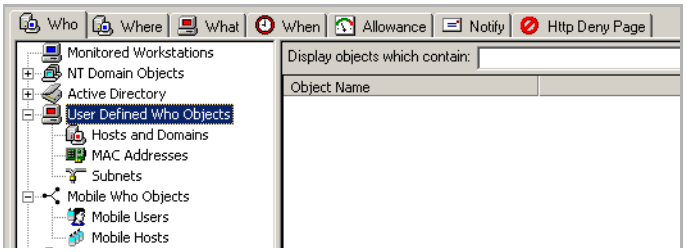
4 Fill in the details on the dialog box that displays.

5 Click **OK**. The object can now be applied to any rule you create.

WHO OBJECTS

Who objects are used to apply rules to certain individuals or groups. The default for Who objects is **Anybody**. The following objects are included in the Who tab:

Figure 7-1 Who objects tab



Monitored Workstations

This rule object shows a list of workstations that are monitored by Web Filter manager, and stored in the database. It is not possible to manually add workstations to this list, because the information is obtained automatically from client machines that request internet access.

If workstations appear as IP addresses, you need to select **Enable Workstation name resolution** on the **Advanced Settings** tab in the Web Filter Service Settings. See "Advanced Tab" on page 104 for more details. You can refresh the list to show the most up to date monitored workstations by pressing F5.

Active Directory, NT and NetWare Domain Objects

These objects are obtained from the network domain, and only apply to local Active Directory, NT, or Novell NetWare networks. It is not possible to manually add Active Directory or NT Domain Objects to this list. You can refresh the list to show the most up to date monitored workstations by pressing F5. Depending on where Web Filter is installed, you will see the objects as described in the table below.

Table 7-1 Active Directory, NT and NetWare Domain objects

Where Installed	Objects seen
Workgroup	NT Domain objects: Workgroup.
NT Domain	NT Domain objects: Workgroup, Domain object.
Active Directory	NT Domain objects: Workgroup, Domain object. Active Directory objects: Domain object: **Note:** Only the currently logged on Active Directory forest will be seen by the Who Object. All trusted NT domains can be seen. SurfControl recommends using the Active Directory objects if Web Filter has been installed in this environment.
NetWare Domain/NT Workgroup	NT Domain objects: Workgroup. NetWare objects: Domain object.

Table 7-1 Active Directory, NT and NetWare Domain objects

Where Installed	Objects seen
NetWare Domain/NT Domain	NT Domain objects: Workgroup, Domain object. NetWare objects: Domain object.
NetWare Domain/Active Directory	NT Domain objects: Workgroup, Domain object. Active Directory objects: Domain object. NetWare objects: Domain object.

User-defined Who Objects

These rule objects have to be created manually, and can consist of the following:

- Hosts and Domains
- MAC Addresses
- Subnets

Mobile Who Objects

If you have installed SurfControl Mobile Filter, you can use the following objects in your rules:

- **Mobile Users** - The user name as defined in the SurfControl Client Administrator.
- **Mobile Hosts** - The host name as defined in the SurfControl Client Administrator.

Who Lists

Who Lists are a combination of Monitored Workstations, NT Domain and User Defined Who Objects. Who lists are a convenient way of grouping Who objects together to share common rules.

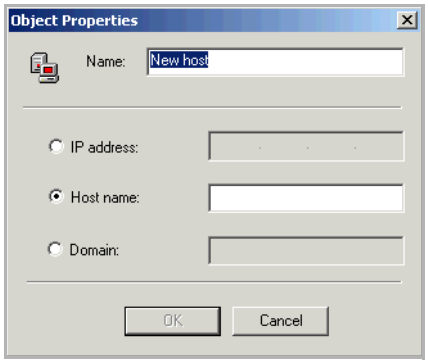
The list of workstations available in the Rules Administrator is the same as you see in the Monitored Data, in addition to the Novell NetWare and Windows NT users defined for the network. As Web Filter detects new users, it updates both the Monitored Data and the Rules Administrator. To refresh the display with the most current contents of the database, press F5.

CREATING USER DEFINED WHO OBJECTS

Hosts and Domains

The Hosts and Domains object is used to apply a rule to a particular IP address, Host name or Domain on your network. A host is a computer that is connected to a TCP/IP network which can include the Internet. Each host has a unique IP address. A domain is a group of computers on a network that are administered as a unit.

Figure 7-2 Hosts and Domain object properties



Note: You can only add a single IP address, Host name or Domain for each object you create. Wildcards are not allowed.

1 Enter a name for your object in the **Name** text box.

2 Select one of the following options:

- **IP address** - Enter the IP address of the workstation the rule will be applied to.
- **Host Name** - The default option. Enter the Workstation name. (You must have **Enable Workstation name resolution** selected in the Advanced tab of the Web Filter Service settings to be able to see Host names in the Monitor. See "Advanced Tab" on page 104 for more details).

3 Enter a name for a network Domain the rule will be applied to.

4 Click **OK** to confirm your settings, or click **Cancel** to disregard changes.

MAC Address

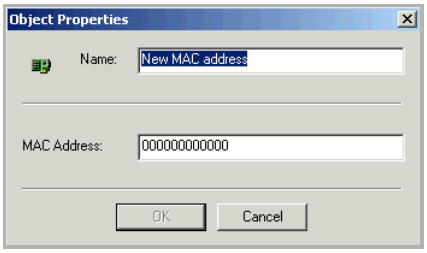
To obtain the MAC address for a particular computer on your network, run the following command from a Command Prompt window:`ipconfig /all`

The **MAC Address** is the **Physical Address** entry.

To obtain the MAC addresses for all network cards on your network, run the following command from the Command Prompt window: `arp -a`

Again, the **MAC Addresses** are the **Physical Address** entries.

Figure 7-3 MAC Address object properties.



- **Name** - Enter a name for your MAC address object.

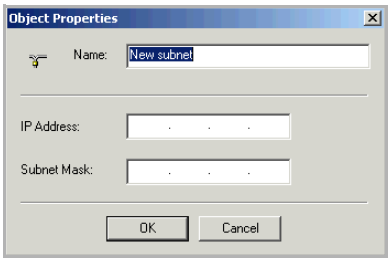
- **MAC Address** - Enter the MAC address for the computer you want the rule to apply to.

Subnet Object

A subnet allows you to take a single IP network address and split it up so that it can be used on several interconnected local networks. A subnet mask determines the maximum number of hosts on a subnetwork.

To obtain the IP address and Subnet Mask for a particular computer on your network, run the following command from a Command Prompt window: `ipconfig /all` Make a note of the **IP Address** and **Subnet Mask** entries.

Figure 7-4 Subnet object properties.

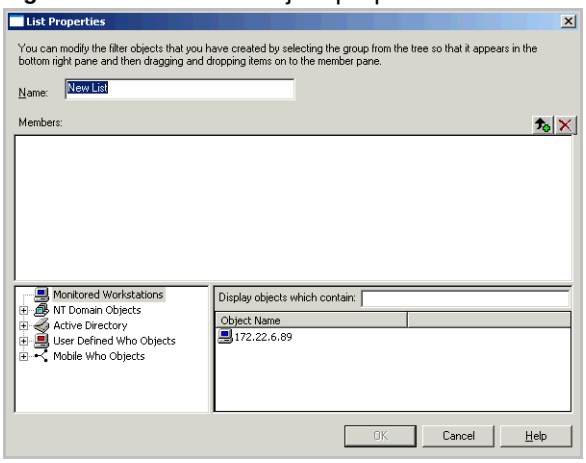


- **Name** - Enter a name for your Subnet object.
- **IP Address** - Enter the IP address.
- **Subnet Mask** - Enter the Subnet Mask.

Who List Objects

A Who list object can consist of several specific objects from the Who Object list. This gives you a convenient way of grouping objects to share a set of rules. To create a Who List, drag individual Who Objects from the bottom right-hand pane to the Members pane.

Figure 7-5 Who List object properties.

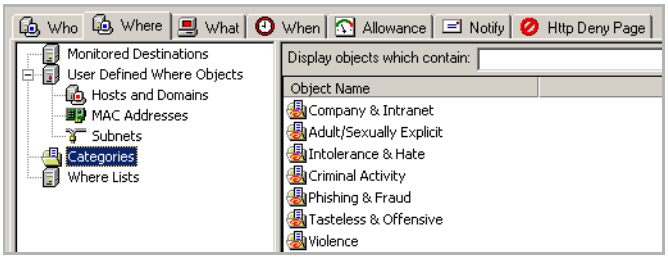

List Properties
You can modify the filter objects that you have created by selecting the group from the tree so that it appears in the bottom right pane and then dragging and dropping items on to the member pane.
Name:
New List
Members:
Monitored Workstations
NT Domain Objects
Active Directory
User Defined Who Objects
Mobile Who Objects
Display objects which contain:
Object Name
172.22.6.89
OK
Cancel
Help

- **Name** - Enter a name for your Who List object.
- **Members** - This panel will show the individual objects that make up your list.

WHERE OBJECTS

Where objects are used to identify the destinations that a rule should apply to. The default for Where objects is **Anywhere**. The following objects are included in the Where tab:

Figure 7-6 Where Objects tab



Monitored Destinations

This rule object shows a list of destinations that are monitored by Web Filter manager, and stored in the database. It is not possible to manually add destinations to this list, because the information is obtained directly from the destinations visited by your users.

You can refresh the list to show the most up to date monitored workstations by pressing F5. See "Monitored Data" on page 34 for more information.

User Defined Where Objects

These have to be created manually and can consist of the following:

- Hosts and Domains
- MAC Addresses
- Subnets

Categories

This is a list of the SurfControl Internet Threat Database categories, and any manually created custom categories.

Where Lists

Where Lists are a combination of Monitored Destinations, User Defined Where Objects and Categories. This is a convenient way of grouping Where objects together to share common rules.

CREATING USER DEFINED WHERE OBJECTS

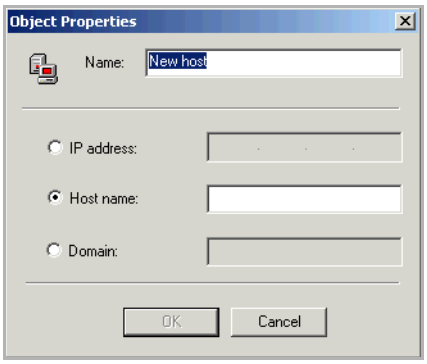
Hosts and Domains

The Hosts and Domains object is used to apply a rule to a particular IP address, Host name or Domain on your network.

A host is a computer that is connected to a TCP/IP network which can include the Internet. Each host has a unique IP address. A domain is a group of computers on a network that are administered as a unit.

Note: You can only add a single IP address, Host name or Domain for each object you create. Wildcards are not allowed.

Figure 7-7 Hosts and Domain object properties.



- **Name** - Enter a name for your object.
- **IP address** - Select IP address and enter the IP address for the workstation the rule will be applied to.
- **Host name** - The default option. Enter the Host name in the following format: www.yoursite.com
- **Domain** - Enter a name for a network Domain the rule will be applied to.

MAC Address

To obtain the MAC Address for a particular computer on your network, run the following command from a Command Prompt window:

```
ipconfig /all
```

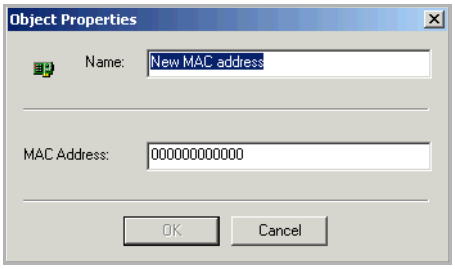
The **MAC Address** is the **Physical Address** entry.

To obtain the MAC Addresses for all network cards on your network, run the following command from the Command Prompt window:

```
arp -a
```

Again, the **MAC Addresses** are the **Physical Address** entries.

Figure 7-8 MAC Address object properties.



- **Name** - Enter a name for your MAC address object.
- **MAC Address** - Enter the MAC address for the computer you want the rule to apply to.

Subnet Object

A subnet enables you to take a single IP network address and split it up so that it can be used on several interconnected local networks.

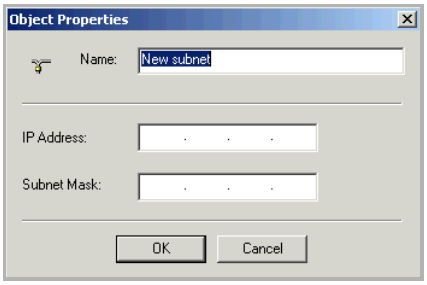
A subnet mask determines the maximum number of hosts on a subnetwork.

To obtain the IP address and Subnet Mask for a particular computer on your network, run the following command from a Command Prompt window:

```
ipconfig /all
```

Make a note of the **IP Address** and **Subnet Mask** entries.

Figure 7-9 Subnet object properties.



- **Name** - Enter a name for your Subnet object.
- **IP Address** - Enter the IP address for the computer.
- **Subnet Mask** - Enter the Subnet Mask.

CATEGORY OBJECT

SurfControl's Internet Threat Database contains over 24 million Web sites and over 3.5 billion Web pages. These sites and pages are allocated to one of SurfControl's fifty five categories as in the table below.

Note: As the SurfControl Adaptive Threat Intelligence team can dynamically add new categories, this list is subject to change. For the latest list and detailed explanation of each category, visit www.surfcontrol.com. You will receive an e-mail informing you of any changes made to the SurfControl Internet Threat Database.

Table 7-2 SurfControl Categories

1	Company & Intranet	29	Kids Sites
2	Adult/Sexually Explicit	30	Motor Vehicles
3	Advertisements & Popups	31	News
4	Alcohol & Tobacco	32	Peer-to-Peer
5	Arts	33	Personals & Dating
6	Blogs & Forums	34	Philanthropic & Professional Orgs
7	Business	35	Phishing & Fraud
8	Chat	36	Photo Searches
9	Computing & Internet	37	Politics
10	Criminal Activity	38	Proxies & Translators
11	Downloads	39	Real Estate
12	Education	40	Reference
13	Entertainment	41	Religion
14	Fashion & Beauty	42	Ringtones/Mobile Phone Downloads
15	Finance & Investment	43	Search Engines
16	Food & Dining	44	Sex Education
17	Gambling	45	Shopping
18	Games	46	Society & Culture
19	Government	47	Spam URLs
20	Hacking	48	Sports
21	Health & Medicine	49	Spyware
22	Hobbies & Recreation	50	Streaming Media
23	Hosting Sites	51	Tasteless & Offensive
24	Illegal Drugs	52	Travel
25	Infrastructure	53	Violence
26	Intimate Apparel & Swimwear	54	Weapons
27	Intolerance & Hate	55	Web-based E-mail
28	Job Search & Career Development		

SurfControl Categories

SurfControl's Adaptive Threat Intelligence team have the ability to dynamically add new categories via an Internet Threat Database update. For this reason SurfControl categories are read only, and appear in the Category Object list with the following icon:

You cannot re-name or delete them from within SurfControl Web Filter. SurfControl categories do not support SmartScan. You must create a custom category to use this functionality.

Custom Categories

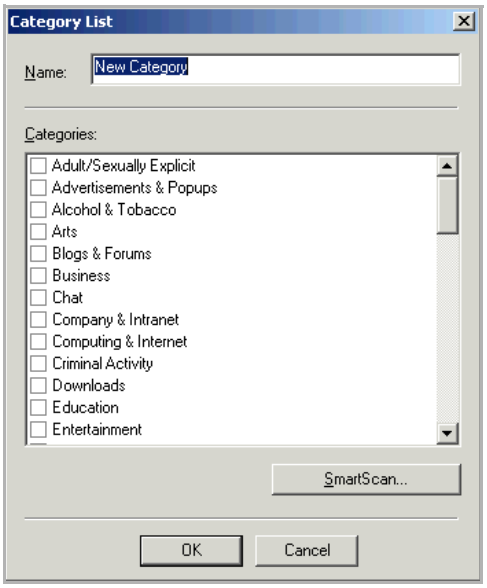
The Category object enables you to create custom categories, which can contain any of the following:

- One or more of the pre-defined SurfControl categories.
- Keywords that are matched against the domain level of a URL, using SmartScan.

Custom categories you create will appear in the Category object list with the following icon:

Custom categories can be re-named and deleted by right-clicking a selected category. If a SurfControl category is added or re-named, and it has an identical name to a custom category you created, your custom category will be amended with brackets containing a number, for example; custom(1).

Figure 7-10 Category List object properties.



1 Enter a name for your new category.

2 Select one or more of the SurfControl Categories you want to include in your new category.

3 If you want to refine the category match, select a category you are including in the object and click SmartScan. Enter the keywords that you wish to match for any domains that will be allocated to the category. The keyword must form all or part of the domain level URL.

Example:

Entering 'football' will match the following URLs:

– www.football365.com
– www.football.guardian.co.uk

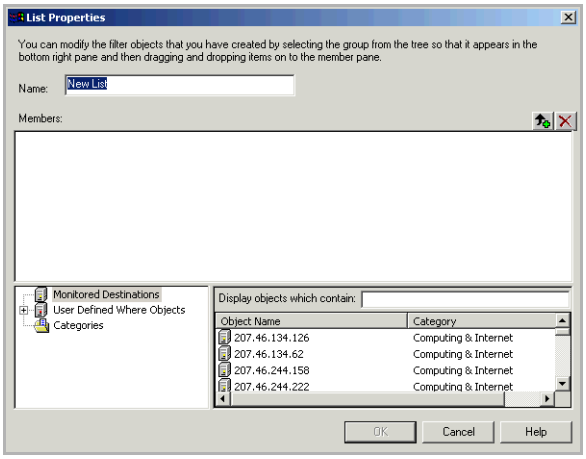
It will not return www.bbc.co.uk/football as 'football' is not part of the domain level URL.

Your new category will now be seen in the Where tab Categories pane. It is important that you move this custom category to the top of the list, so it is applied before the standard categories. To do this, click **Set Category Object Order** on the **Tools** menu.

WHERE LISTS

A Where list object can comprise of several specific objects from the Where object list (see figure below). This provides a convenient way of grouping objects to share a set of rules. To create a Where List, drag individual Where objects (Monitored Workstations, NT Domain objects and User-Defined Where Objects) from the bottom right-hand pane to the upper left-hand pane in the Where List dialog box.

Figure 7-11 Where List object dialog box

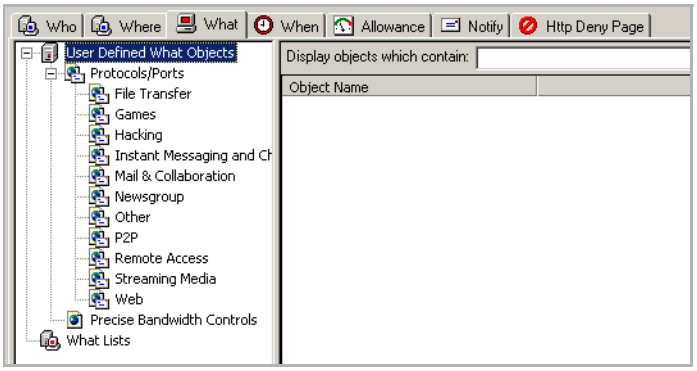


- **Name** - Enter a name here for your Where List object.
- **Members** - This panel will show the individual objects that make up your list.

WHAT OBJECTS

What objects are used to identify the content that a rule should apply to. The default for What objects is **Anything**. The following objects are included in the What tab:

Figure 7-12 What objects tab



PROTOCOLS/PORTS OBJECTS

In the Rules Administrator, the monitored protocols and associated ports are shown in the table below. The protocols marked with an asterisk (*) are monitored by default.

Table 7-3 Rules Administrator Configured Protocols/Ports

Protocol Group	Protocol	Port
File Transfer	FTP*	20, 21
	Gopher*	70
	WAIS	210
	FTTPS (FTP over SSL)	989, 990
Gaming	Half Life	27010, 27015
	Quake 3	27960 - 27969
	World of Warcraft	3724
	EVE Online	26000
Hacking	Back Orifice	31337
	Sub7	27374
Instant Messaging and Chat	Gadu-Gadu	8074
	Jabber/SIMP*	7467
	Jabber/XMPP*	5222 - 5224

Table 7-3 Rules Administrator Configured Protocols/Ports

Protocol Group	Protocol	Port
	Windows Live Messenger*	1863
	OSCAR (AIM/ICQ)*	5190
	Yahoo! Messenger*	5050
	IRC*	6660-6669
	IRCS (IRC over SSL)	994
	Camfrog	2778, 6005
	Eyeball Chat	5500, 5501, 5515
	X-IM	5221
Mail & Collaboration	POP3	110
	Lotus Notes	1352
	NetMeeting	522, 1503, 1720, 1731
	SMTP	25
	IMAP	143
Newsgroup	NNTP*	119
	NNTPS (NNTP over SSL)	563
P2P	BitTorrent*	6881 - 6999
	eDonkey*	4661, 4662
	EZPeer*	8870
	FastTrack (Kazaa)*	1214
	Gnutella*	6346, 6347
	Hotline Connect*	5500 - 5503 (range)
	Skype*	33033
	WinMX*	6699
Remote Access	Citrix	1494
	GoToMyPc	8200
	PCAnywhere	5631, 5632, 65301
	PCTelecommute	2299
	Terminal Services	3389

Table 7-3 Rules Administrator Configured Protocols/Ports

Protocol Group	Protocol	Port
	RAdmin remote administration tool	4899
	SOCKS 5	1080
	PPTP	1723
Streaming Media	Liquid Audio*	18888
	PNM/PNA	7070
	RTSP (Quicktime, RealPlayer)*	554, 8554
	Windows Media/MMS*	1755
Web	Google Web Accelerator	9100
	HTTP*	80, 8000, 8080, 3128
	HTTPS*	443, 8443
Other	LDAP*	389
	NFS	2049
	SSH	22
	Telnet	23
	Daytime	13
	Domain	53
	Echo	7
	Ident	113
	Nbsession	139
	Whois	43
	Time	37
	Finger	79
	rlogin	513
	SQL net	1433, 1434, 1521, 1525
	Pptp	1723

Filtering IM, P2P and Web Protocols by signature

The Instant Messsaging and Chat (IM) Peer 2 Peer (P2P) and Web Accelerator protocols in the table below are port-agile. If a connection fails (for example, due to a disallow rule) on the default port, these applications will attempt to use another available port. Enabling Protocol Signature Scanning from the Protocol Signatures tab in the Web Filter Settings will ensure that these protocols are filtered when the protocols use non-default ports. See "Protocol Signatures Tab" on page 107 for further details.

When adding an Instant Messaging and Chat, Peer to Peer (P2P) or Web **Protocol and Port** object to a rule, the Rules Administrator will only filter the following protocols by signature:

Table 7-4 Signature scanning protocols

Application type	Protocols
Instant Messaging	• MSN Messenger • OSCAR (AIM/ICQ) • XMPP (Jabber)
Peer to Peer (P2P)	• BitTorrent • eDonkey • FastTrack (Kazaa) • Gnutella • Skype • Yahoo! Messenger
Web	• Google Web Accelerator

Note: Protocol signature scanning will filter direct HTTP connections and HTTP proxy connections. It will not filter when connecting via a SOCKS proxy.

PRECISE BANDWIDTH CONTROLS OBJECT

With Precise Bandwidth Control, you can accurately define what content you want to allow or block. By creating rules with Precise Bandwidth Controls, you can block pages or files that contain precise prefixes, suffixes, or word patterns. These rules operate by identifying the contents within the URL rather than just the top level domain name.

Precise Bandwidth Control objects are “if” statements, which means that if you apply more than one Precise Bandwidth Control object to a rule, the rule will be triggered when any combination of the objects are met. For example, a disallow rule which has precise bandwidth control objects of **Audio files** and **Video Files** assigned to it, will block an attempt to access web pages that contain audio files or video files or both.

Note: If a Category object is assigned to a rule containing Precise Bandwidth Controls, a destination will only be blocked if it is within the category AND the URL triggers one or all of your Precise Bandwidth Controls.

To create a precise bandwidth control:

1 From the **What** tab, expand **User Defined What Objects** and click **Precise Bandwidth Controls**.

2 Right-click in the display objects window and select **New**.

3 Enter a name for your Precise Bandwidth Control.

4 Select one of the following options:

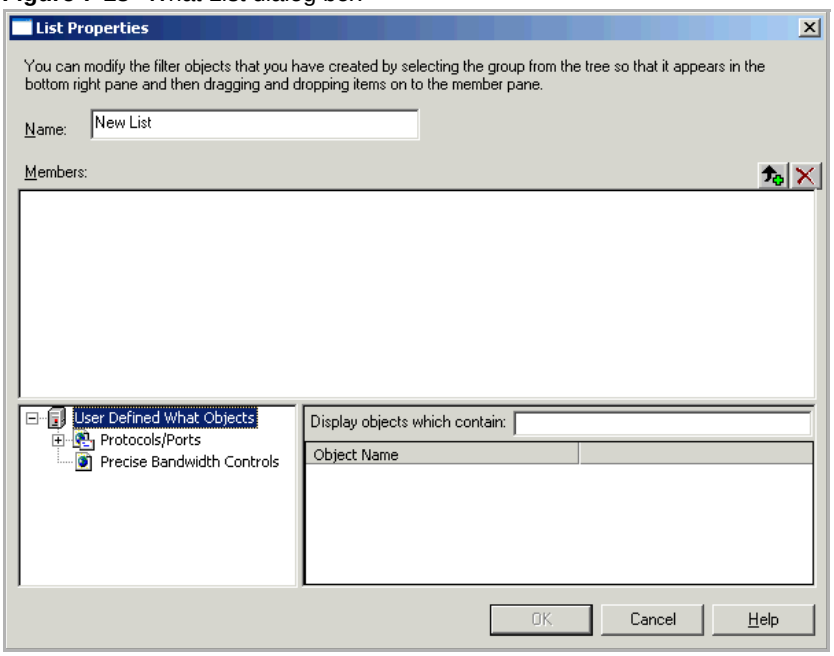
- **Starts with** - For instance, the word ‘jobs’ means any part of the URL that starts with the word jobs (for example, www.jobserve.co.uk) will match, but www.topjobs.co.uk will not.
- **Ends with** - If you specify the word ‘.gif’ for example, www.example.com/home.gif will match, but www.example.com/my.gifs will not.
- **Contains** - If you specify ‘jobs’ in the field both www.jobserve.co.uk and www.topjobs.co.uk will match.

Note: You can enter multiple selections by using a comma or a space to separate the selections.

WHAT LISTS

A What list object can comprise of several specific objects from the What object list. This gives you a convenient way to group objects that you need to share a set of rules. To create a What List, drag individual What objects (Protocols/Ports and Precise Bandwidth Controls) from the bottom right-hand pane to the upper left-hand pane in the What List dialog box.

Figure 7-13 What List dialog box


List Properties
You can modify the filter objects that you have created by selecting the group from the tree so that it appears in the bottom right pane and then dragging and dropping items on to the member pane.
Name:
New List
Members:
User Defined What Objects
Protocols/Ports
Precise Bandwidth Controls
Display objects which contain:
Object Name
OK
Cancel
Help

WHEN OBJECTS

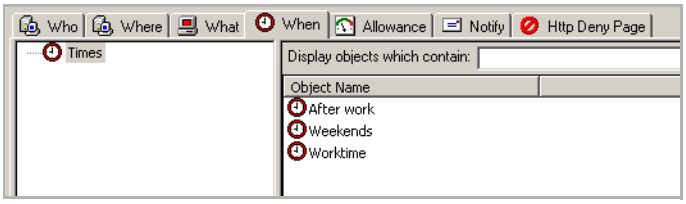
When objects are used to define the time and date when a rule will be applied. The default setting for When objects is **Anytime**.

Note: When objects are defined in 24-hour clock notation.

SurfControl Web Filter is supplied with three pre-defined When objects:

- After Work
- Weekends
- Worktime

Figure 7-14 When objects tab



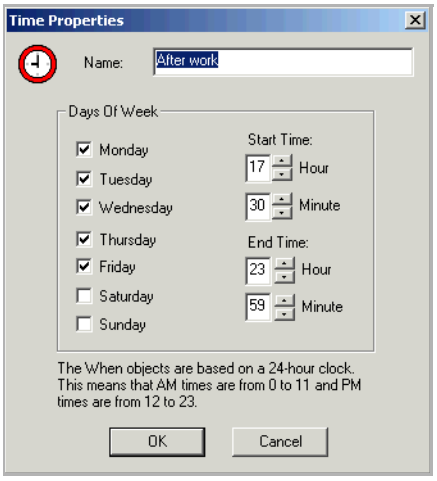
You can either create a new When object, or change the default properties of the supplied objects to suit your purposes.

After Work

Right-click the object and select **Properties**. The After work object has the following default properties:

- **Days of the Week** - Monday to Friday.
- **Start Time** - 17:30.
- **End Time** - 23:59.

Figure 7-15 After Work object properties.

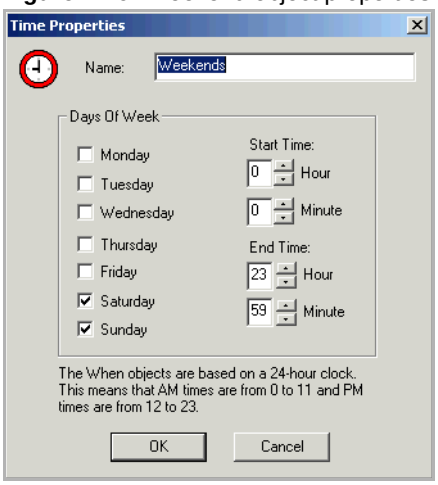


Weekends

Right-click the object and select **Properties** to view. The Weekends When object has the following default properties:

- **Days of the Week** – Saturday & Sunday.
- **Start Time** – 0:00.
- **End Time** – 23:59.

Figure 7-16 Weekend object properties

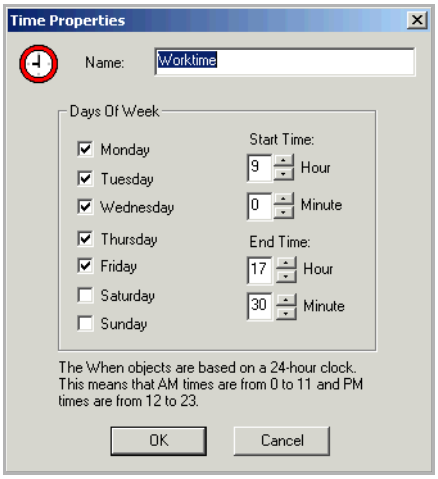


Worktime

Right-click the object and select **Properties**. The Worktime When object has the following default properties:

- **Days of the Week** – Monday to Friday.
- **Start Time** – 09:00.
- **End Time** – 17:30.

Figure 7-17 Worktime object properties



When objects cannot cross a 24 hour period. For example, you cannot have a single object that starts at 19:00 (7pm) and finishes at 07:00 (7am). You need two objects, one starting at 19:00 and finishing at 23:59 for one day and another starting at 00:00 and finishing at 07:00 for the following day.

ALLOWANCE OBJECTS

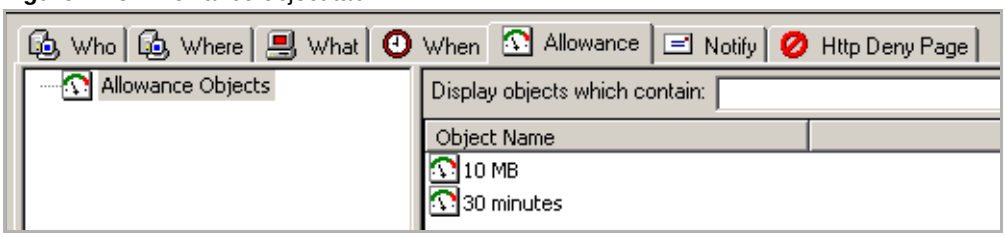
Allowance objects are used to permit Internet access for a specified period of time or to allow a set amount of data to be downloaded. Once these limits have been reached, access is blocked.

Note: Allowance objects can only be applied to the HTTP protocol.

Web Filter is supplied with two pre-defined Allowance objects, which have a default value of **None**:

- 10 MB volume object
- 30 minutes time value object

Figure 7-18 Allowance object tab

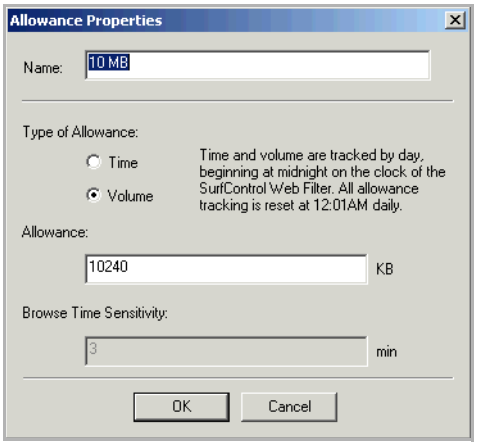


You can either create a new Allowance object, or change the default properties of the supplied objects to suit your purposes.

10 MB VOLUME OBJECT

Right-click the object and select **Properties** to see the Properties dialog:

Figure 7-19 10 MB object properties



The 10 MB Allowance object has the following default properties:

- **Type of Allowance** - Volume
- **Allowance Limit** - 10240 KB

Note: If the first file a user attempts to download exceeds the volume limit, this file will still be downloaded. All subsequent download attempts will be blocked. Web Filter can only judge the size of a file once it has been downloaded.

30 MINUTE TIME OBJECT

Right-click the object and select **Properties**. The 30 Minute Allowance object has the following default properties:

Figure 7-20 30 Minute object properties

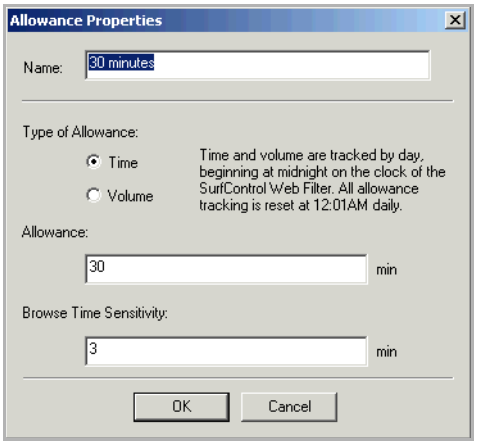


Table 7-5 30 Minute object properties

Type of Allowance	Allowance Limit
Time	30 min
Browse Time Sensitivity	3 min

About Browse Time Sensitivity

Browse time sensitivity refers to the maximum amount of time Web Filter presumes a user to be actively engaged with a site. Browse time sensitivity is also used to offset the uncertainty about how much actual time a user is engaged in browsing. By default, browse time sensitivity is set to three minutes.

Browse time sensitivity comes into play every time a user launches a browser. However, the way in which Web Filter attributes browse time sensitivity depends on whether the browsing takes place as a stand-alone occurrence or in a sequence of connections.

- **Stand-Alone Browsing**

  Stand-alone browsing is a single connection to the Internet. For example, stand-alone browsing occurs when a user opens their browser and makes a connection to a site, does not go to any subdirectories of the site, then either closes their browser or does not make any more connections.

  When a user browses in a stand-alone occurrence, Web Filter calculates the browse time to be equal to the Browse Time Sensitivity setting (by default, three minutes).

  – **Example**

    A user opens a connection to CNN.com. Technically, they spend forty-five minutes at the site, because even though they stop browsing and are working on other tasks, the browser is left open.

    The browse time to CNN.com is calculated to be three minutes because the Browse Time Sensitivity is set to three.

- **Continuous Browsing**

  Continuous browsing occurs when there is a sequence of connections, each one made within three minutes of the last. SurfControl Web Filter automatically adds the browse time sensitivity value to the last connection in the sequence.

  – **Example**

    A user opens their browser and makes a connection to ebay.com for two minutes, connects to ebay.com\ebaymotors for one minute, then opens ebay.com\ebaymotors\motorcycles for one minute. Web Filter records the browse time as in the table below:

Table 7-6 Example of Continuous Browsing Recording

From	To	+Browse Time Sensitivity	Duration
10:00	10:02		2 minutes
10:02	10:03		1 minute
10:03	10:04	3 minutes	4 minutes
		Total Browse time	**7 minutes**

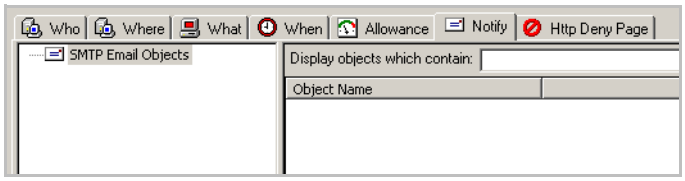
NOTIFY OBJECTS

Notify objects enable you to e-mail specified people within the organization when a rule has been triggered. These objects work in different ways, depending on the type of rule.

Note: A default Notify object is not provided.

- **Allow rule** - One message will be sent once per hour per user.
- **Disallow rule** - One message will be sent per user each time a rule is triggered.
- **Allowance rule** - After the Allowance limit is exceeded, one message per user is sent each time the rule is triggered.

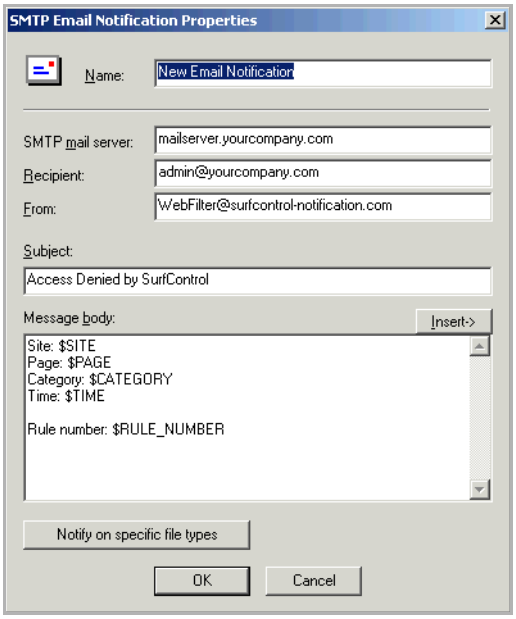
Figure 7-21 Notify Objects tab



To create a new notify object:

1 Click the **Notify** tab and right-click in the display objects pane.

Figure 7-22 SMTP Email Notification object properties.



2 Enter a name for your new Notify object.

3 Enter the address of your mail server in the **SMTP mail server** text box. This information can be obtained from the E-mail Notification tab in the Web Filter Service Settings dialog box. Right-click the SurfControl icon in the notification area of the taskbar.

4 Enter the e-mail address of the person you want to receive the notification in the **Recipient** text box. If you want to send the message to multiple recipients, make sure there is a space between each e-mail address.

5 In the **From** text box, you can either leave the default address in this field, or enter a suitable address for your own organization.

6 Enter a relevant subject for your e-mail object in the **Subject** text box.

7 The object comes with pre-defined data that you can include in the construction of your notification object. Click Insert in the **Message Body** text box and select any of the following:

- User
- Workstation
- Site
- Category
- Protocol
- Time
- Rule Number
- Page

Note: You can also use these variables in the Subject line, to enable the recipient to discover why a web page is being blocked, without having to inspect the entire body of the message.

8 By default, the notification object is only triggered if the base Web page is blocked. Click **Notify on Specific File Types** to specify which file types you want to send notifications on. Click the button and select the file type from the dialog box.

The available file types are shown in the table below:

Table 7-7 Notification File Types

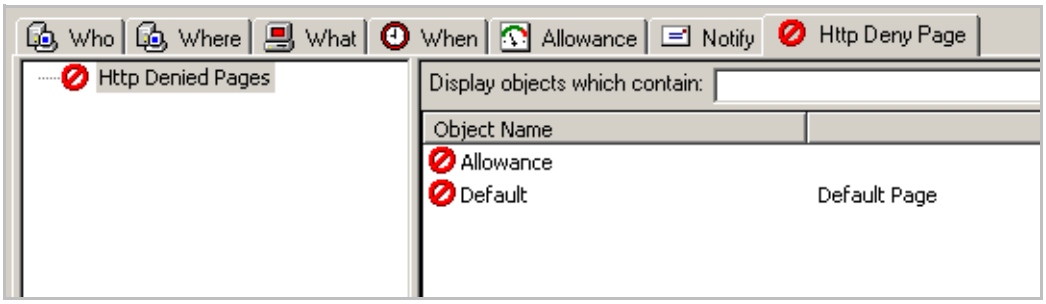
File Type Group	File Extensions
Audio Files	aac, aif, aifc, aiff, au, cda, m3u, m4p, mid, midi, mp3, ogg, rmi, snd, wav, wax, wma.
Compressed Files	ace, arc, arj, b64, bhx, cab, gz, gzip, hqx, iso, jar, lzh, mim, rar, tar, taz, tgz, tz, uu, uue, xxe, z, zip.
Documents	csv, doc, docx, dot, pdf, ppt, pptx, ps, rtf, txt, xls, xlsx.
Executables	bat, cfc, cmd, com, dll, exe, jse, ocx, xpi.
Feeds	opml, rdf, rss, rss2, xml.
Images	bmp, gif, jfif, jpe, jpeg, jpg, pcx, png, psd, tif, tiff, wmf.
Scripting	cgi, js, php, pl, py, vb, vbe, vbs.
Video Files	asf, asx, avi, divx, ivf, mlv, mov, mp2, mp2v, mpa, mpe, mpeg, mpg, mpv2, qt, ra, ram, rm, swf, wm, wmd, wmp, wmv, wmx, wvx, wxv.
Web Pages	asp, aspx, css, htm, html, jsp, mspx, shtml, stm.

HTTP DENY PAGE OBJECTS

HTTP Deny Page objects are Web pages that a user will see when they have triggered a rule, for example if they try to access a site that is blocked. The default setting for HTTP Deny Page objects is **Default**. Web Filter is supplied with two pre-defined HTTP Deny Page objects:

- Default
- Allowance

Figure 7-23 HTTP Deny Page object tab

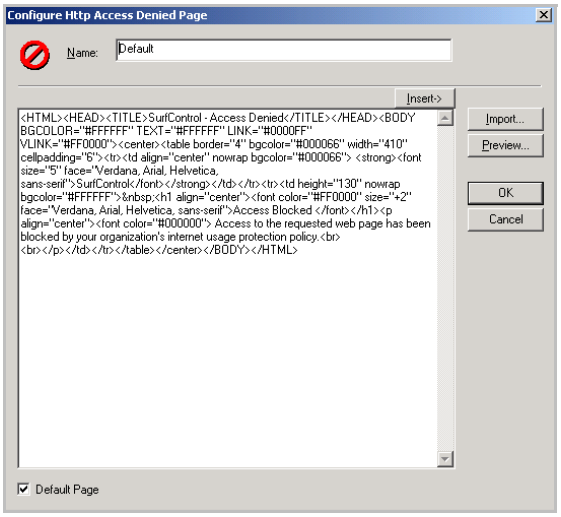


Caution: Deny Page objects will not function when blocking HTTPS destinations.

DEFAULT

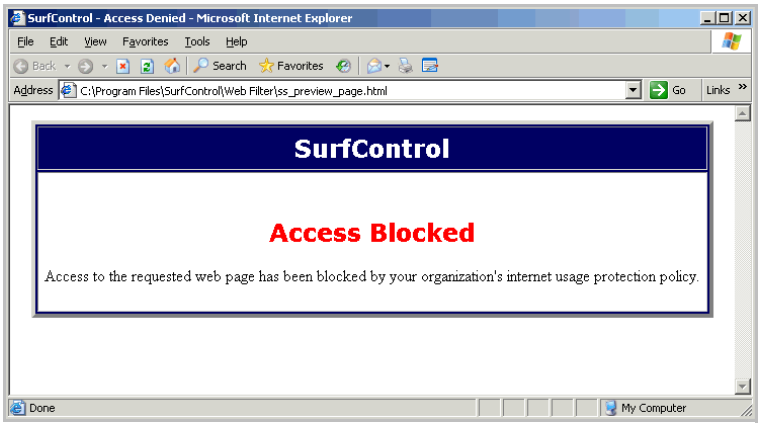
The Default HTTP Deny Page object has the following default properties. Right-click the object and select **Properties**:

Figure 7-24 Default HTTP Deny Page object properties



You can edit the text from within the object. See "Constructing HTTP Deny Pages" on page 86 for restrictions applying to editing or constructing deny pages.

Figure 7-25 Default HTTP Deny Web page


SurfControl - Access Denied - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Address C:\Program Files\SurfControl\Web Filter\ss_preview_page.html
SurfControl
Access Blocked
Access to the requested web page has been blocked by your organization's internet usage protection policy.
Done
My Computer

From the dialog box you have the following options:

- **Import** - You can import HTML code you have created in a file elsewhere, or you can re-import the default deny page text from the following location:

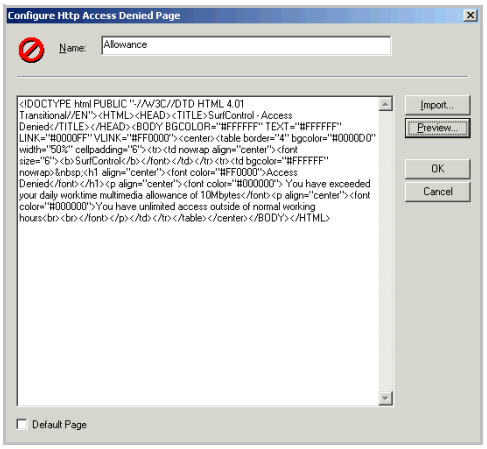
  `C:\Program Files\SurfControl\Web Filter\Sample Denied Text\Default_Denied.html`

- **Preview** - Use this option to see how your deny page will look in a browser.
- **Default Page** - This option is selected as this is the default page supplied by SurfControl.

ALLOWANCE

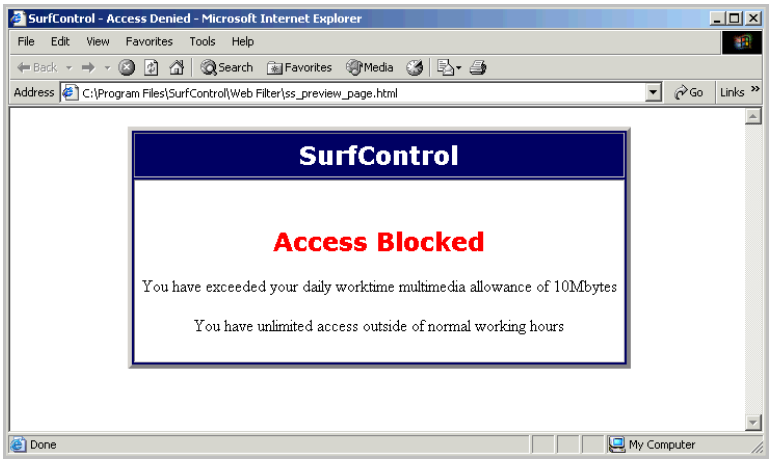
The Allowance HTTP Deny Page object has the following default properties. Right-click the object and select **Properties**.

Figure 7-26 Allowance HTTP Deny Page object properties



You can edit the text from within the object. See "Constructing HTTP Deny Pages" on page 86 for restrictions applying to editing or constructing deny pages.

Figure 7-27 Allowance HTTP Deny Web page


SurfControl - Access Denied - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Address C:\Program Files\SurfControl\Web Filter\ss_preview_page.html
SurfControl
Access Blocked
You have exceeded your daily worktime multimedia allowance of 10Mbytes
You have unlimited access outside of normal working hours
Done
My Computer

From the dialog box you have the following options.

- **Import** - You can import HTML code you have created in a file elsewhere, or you can re-import the default deny page text from the following location:

  `C:\Program Files\SurfControl\Web Filter\Sample Denied Text\Default_Denied.html`
- **Preview** - Use this option to see how your deny page will look in a browser.
- **Default Page** - Select this checkbox if you want this page to be the default Deny page displayed.

OTHER HTTP DENY PAGE OBJECTS

SurfControl has supplied the following html pages which you may find useful when creating custom deny pages:

- **`Redirect_Denied.html`** - Redirect a user to a deny page.
- **`Refresh_to_AUP.html`** - This allows you to redirect a user to your Acceptable Use Policy. In a default installation, these pages can be found in the following location:

  `C:\Program Files\SurfControl\Web Filter\Sample Denied Text\`

CONSTRUCTING HTTP DENY PAGES

When constructing your own HTTP Deny Pages, you are restricted to using 1024 characters or less, including the HTML tags, when building your deny page. In addition there are the following objects you can insert into your HTTP Deny Page objects:

- User
- Client_IP
- Site
- Category
- Page

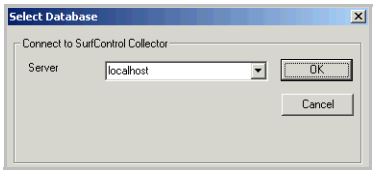
VIEWING ANOTHER COLLECTOR

If you have more than one collector on your network, you can quickly change to a different one from within the Rules Administrator. You can then view the rules in place for a specific collector within your organization.

To change the collector from within the Rules Administrator:

1 Click the **Open** icon in the Rules Administrator.

A Select Database dialog box is displayed.



2 Enter the server name, or select a previously selected server from the list.

3 Click **OK**.

Chapter 8

Real Time Monitor

Introduction . . . . . page 90

Display Columns . . . . . page 92

Category Color. . . . . page 93

Collector Details . . . . . page 94

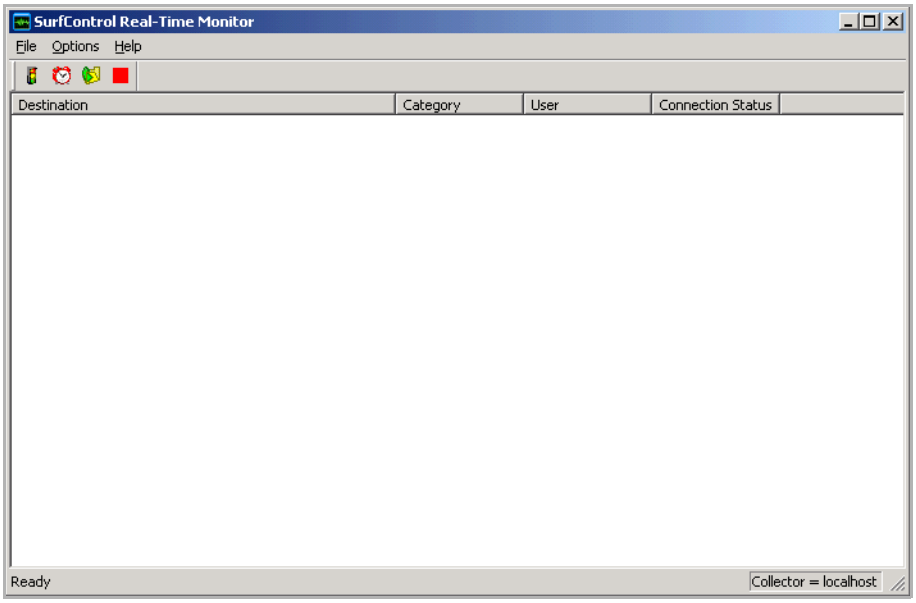
Stopping and Starting the Real-Time Monitor . . . . . page 95

INTRODUCTION

The Real-Time Monitor shows Internet activity on your network as it is happening. This is different from the Monitored Data in the Web Filter Manager, which displays historic information that has been saved in your database.

To open the **Real-Time Monitor** from the **Web Filter Manager** select **Content Protection > Real-Time Monitor** from the appropriate collector or database in the **Navigation** tree. The Real-Time Monitor is also available from the **Start > All Programs > SurfControl Web Filter** menu.

Figure 8-1 Real-Time Monitor



You can right click a destination in the Real-Time Monitor to visit the selected destination in your Web browser. This is a convenient way to inspect the web sites frequented by users, as soon as they are visited.

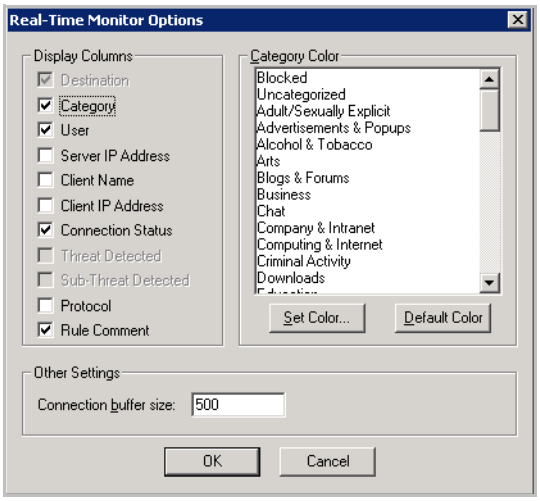
The following columns are visible by default in the Real-Time Monitor:

Table 8-1 Real-Time Monitor Columns

Column	Description
Destination	Identifies the destination name.
Category	Identifies the Category Web Filter has assigned to the destination.
User	Identifies the user.
Connection Status	Indicates whether the destination was Allowedor Blocked by Web Filter.

Other columns can be configured via the **Options** menu. Select **General** from the **Options** menu. The Real-Time Monitor Options dialog box displays as shown below.

Figure 8-2 Real-Time Monitor Options dialog box



Note: Changes made in the Real-Time Monitor Options dialog box clear the existing Real-Time Monitor buffer.

DISPLAY COLUMNS

Under Display Columns, you can define which columns are displayed in the Real-Time Monitor window.

Table 8-2 Real-Time Monitor columns

Column	Description	Default Option
Destination	Shows the destination being visited	Yes (this option cannot be cleared).
Category	Shows the SurfControl category assigned to the destination. If a destination has not been categorized it will be shown as 'None	Yes
User *	Shows the user name of the person accessing the destination.	Yes
Server IP Address	Shows the IP Address for the server hosting the destination.	No
Client Name *	The name of the client computer accessing the destination.	No
Client IP Address *	The IP Address of the client computer accessing the destination.	No
Connection Status	Shows whether the destination was Allowed or Blocked by a SurfControl Web Filter rule.	Yes
Protocol	Displays the communication protocol used for the connection.	No
Rule Comment	Displays the description of the rule for easy identification.	No

* These columns are unavailable in the Privacy Edition of Web Filter.

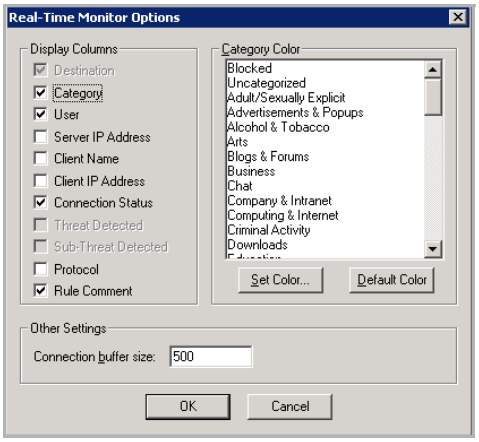
CATEGORY COLOR

This option allows you to assign a color to a SurfControl Category. This can aid you in spotting trends in surfing habits in the Real-Time Monitor.

Assigning a Category Color

To assign a color to a category:

1 Select a Category from the **Category Color** list.



2 Click **Set Color**. A color palette will appear.

3 Select a basic color from the chart or click **Define Custom Colors** to select HSL or RGB color values.

4 Click **OK**. The Category definition will now be highlighted in the color chosen.

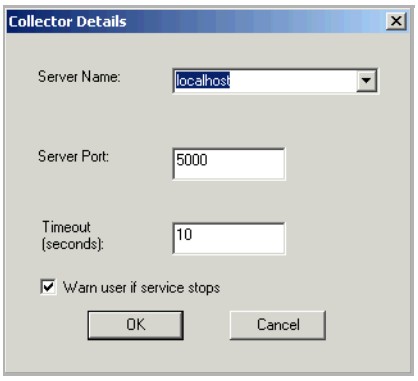
OTHER SETTINGS

You can set the number of lines to be viewed in the Real-Time Monitor, by typing in a value in the **Connection buffer size** field. The default setting is 500 lines.

COLLECTOR DETAILS

You can view information about the Real-Time Monitor connector by selecting **Collector Details** from the **Options** menu.

Figure 8-3 Collector Details



1 Enter the name of the server that the Real-Time Monitor should connect to, in the **Server Name** text box. You can enter the name of a new server into the drop-down list box. This server is then stored in the drop-down list. You can store up to ten servers.

Note: The first time you connect to the Real-Time Monitor, the Collector Details dialog box will display, with localhost as its default Server Name. If you change the Server Name, the Real-Time Monitor will attempt to connect to this collector when subsequently accessed. If it cannot connect to this collector, a warning is displayed.

2 Enter the Port number which the Real-Time Monitor connects to the Web Filter service on, in the **Server Port** text box (the default is 5000). Before changing the port number, check that it is not used by another program first.

3 Enter the time that the Real-Time Monitor will wait before reporting an error if the connection with the Server is lost, into the **Timeout (seconds)** text box.

4 Select **Warn user** if the service drops. If selected, an error message will display if the connection to the server is lost.

STOPPING AND STARTING THE REAL-TIME MONITOR

If there is a lot of traffic being detected by the Real-Time Monitor, you can temporarily stop the traffic. This will enable you to browse the destinations being seen at that time. The number of destinations you can see is limited by the value set in the **Connection buffer size** option. Once you have finished browsing you can start the Real-Time Monitor again.

Note: Data is not cached by the Real-Time Monitor when it is stopped, so destinations visited while the Real-Time Monitor is stopped will not be seen when you restart.

Chapter 9

Web Filter Settings

Introduction . . . . . page 98
Available Settings . . . . . page 99
Start/Stop Service Tab . . . . . page 100
Active Directory Tab . . . . . page 101
Subnets Tab . . . . . page 102
Advanced Tab . . . . . page 104
Categorization Tab . . . . . page 106
Ignored Ports Tab . . . . . page 108
Real-Time Monitor Tab . . . . . page 111
Database Tab . . . . . page 112
E-mail Notifications Tab . . . . . page 114

INTRODUCTION

You can configure how SurfControl Web Filter monitors and filters Internet traffic, by configuring the Web Filter service settings.

HOW TO CONFIGURE THE WEB FILTER SETTINGS

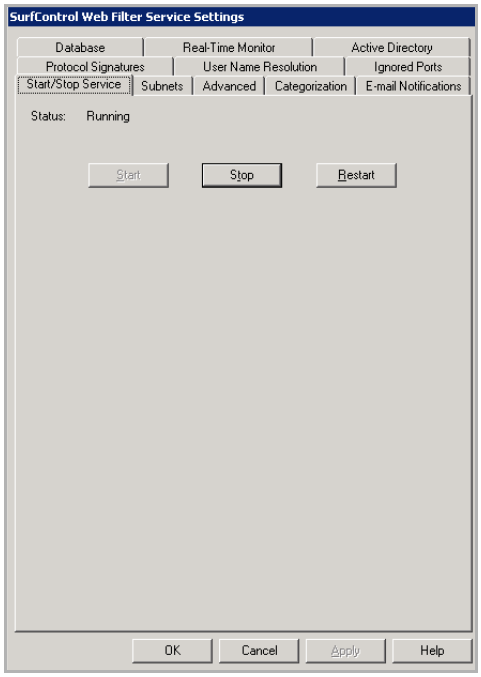
There are three ways in which you can open the Web Filter settings:

- Right-click the SurfControl icon in the notification area of the task bar.
- Select **SurfControl Web Filte**r from the **Control Panel**.
- From the **Web Filter Manager**, select **Maintenance > Web Filter Settings** from the appropriate collector or database in the **Navigation** tree.

AVAILABLE SETTINGS

To configure the Web Filter service settings, open the Web Filter Settings dialog box as shown below:

Figure 9-1 Web Filter service Settings



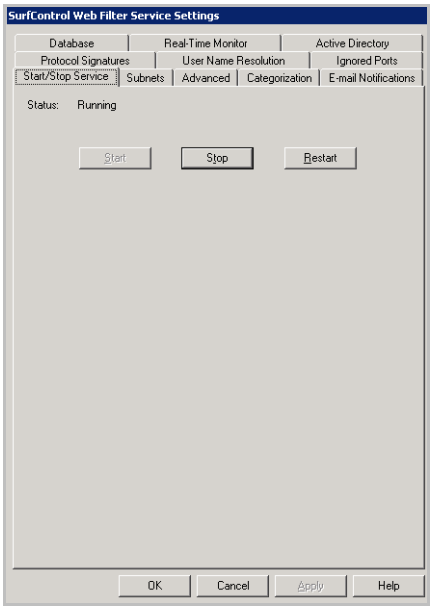
You can use this dialog box to:

- Start, stop and restart the Web Filter service.
- Configure any subnets and IP addresses.
- Configure how users and destinations can be viewed in the Web Filter Manager.
- Configure how monitored traffic is transferred to your database.
- Configure how Web Filter connects to Active Directory.
- Edit the e-mail notifications set up during installation.
- Configure the Real-Time Monitor connection settings.
- Configure how Web Filter categorizes the destinations it sees in the Web Filter Manager.

START/STOP SERVICE TAB

Before applying changes to the service and monitored data settings, the service needs to be stopped. For further details, see "Monitored Data" on page 34.

Figure 9-2 Start/Stop Service tab



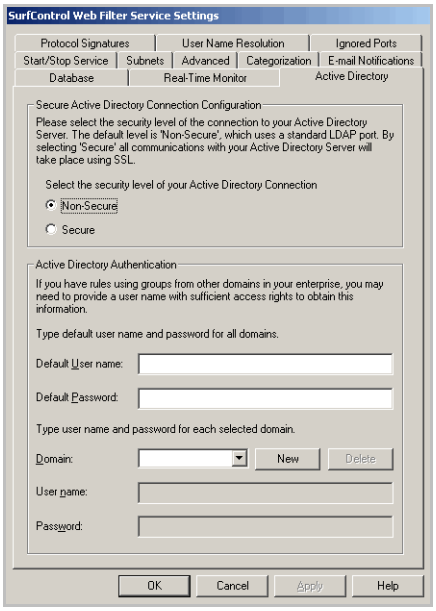
When you stop the service, the SurfControl icon in the notification area of the task bar is grayed out. When you start or restart the service, the icon will revert back to color.

Note: You can quickly start, stop, and restart the service from the SurfControl icon in the notification area on the task bar.

ACTIVE DIRECTORY TAB

By default, connection to your Active Directory server is via a non-secured LDAP connection. You can change this to a secure SSL connection using port 636 from this tab. You can also provide user name credentials for each trusted domain, and one default user name and password for all domains. This allows rules which contain group objects from other domains, to obtain relevant user information from those domains. The Active Directory tab is shown below.

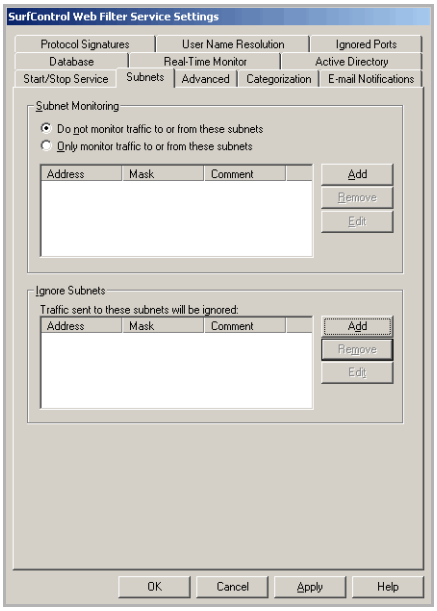
Figure 9-3 Active Directory tab.


SurfControl Web Filter Service Settings
Protocol Signatures
User Name Resolution
Ignored Ports
Start/Stop Service
Subnets
Advanced
Categorization
E-mail Notifications
Database
Real-Time Monitor
Active Directory
Secure Active Directory Connection Configuration
Please select the security level of the connection to your Active Directory Server. The default level is 'Non-Secure', which uses a standard LDAP port. By selecting 'Secure' all communications with your Active Directory Server will take place using SSL.
Select the security level of your Active Directory Connection
Non-Secure
Secure
Active Directory Authentication
If you have rules using groups from other domains in your enterprise, you may need to provide a user name with sufficient access rights to obtain this information.
Type default user name and password for all domains.
Default User name:
Default Password:
Type user name and password for each selected domain.
Domain:
New
Delete
User name:
Password:
OK
Cancel
Apply
Help

SUBNETS TAB

You can help your Web Filter server work more efficiently by using the Subnets tab to help balance the load.

Figure 9-4 Subnets tab



The Subnets tab has two sections.

- **Subnet Monitoring**

  These settings help balance the load on your Web Filter service.

- **Ignore Subnets**

  These settings shows the internal subnets that are detected during installation to help balance the load on the server. These subnets are not monitored.

SUBNET MONITORING

The Subnet Monitoring section is used to identify which parts of your network should be monitored or not by each Web Filter server. How you decide on this, depends on whether you have single or multiple Web Filter servers, and how you want to divide the network volume load of traffic between those servers. To configure your subnets on a single Web Filter server:

1 Identify the external traffic subnets you do not want to monitor.

2 Click the Subnets tab, and click **Add**.

3 Enter the IP address of the subnet in the IP Address text box.

4 Enter the subnet mask in the Mask text box.

5 Click **OK**.

6 Repeat steps 1 to 5 for other subnets you do not want to monitor.

7 Select Do not Monitor traffic to or from these subnets.

By configuring subnets on multiple Web Filter servers, you ensure the subnets are only monitored on one server in your network environment. You need to specifically identify subnets you do not want to monitor on one Web Filter server, and define one or more subnets you do want to monitor on each subsequent Web Filter server. This allows you to divide the volume load of network traffic across your servers, making them more efficient. To configure your subnets on multiple Web Filter servers:

1 Identify the subnets you do not want to monitor.

2 On the first Web Filter server, click the Subnet tab, and click Add.

3 Enter the ip address of the subnet in the IP Address text box.

4 Enter the subnet mask in the Mask text box.

5 Click OK.

6 Repeat steps 1 to 5 for other subnets you do not want to monitor.

7 Select Do not Monitor traffic to or from these subnets.

8 For each subsequent Web Filter server, you should identify a specific subnet that you do want to monitor. To do this, identify subnets you do want to monitor, and follow steps 2 to 5.

9 Select Only Monitor traffic to or from these subnets.

Ignore Subnets

During installation, Web Filter detects the internal subnets on your monitoring and blocking network card. The Web Filter server ignores inbound traffic to these internal subnets, reducing the load on the Web Filter Service.

The subnets detected are listed in the **Ignore Subnets** section of the Subnets tab. You also have the following options:

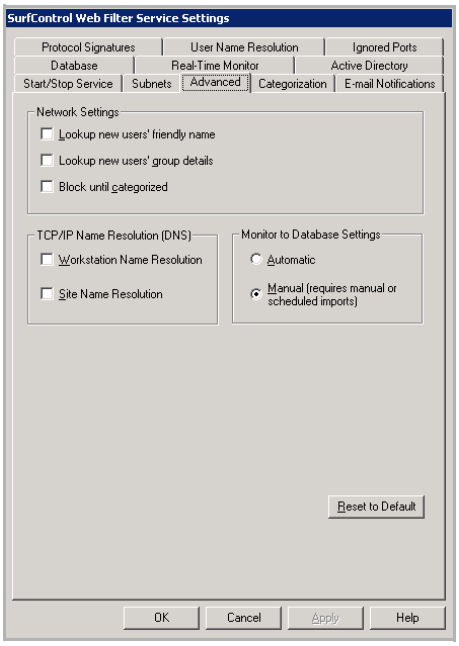
- **Add** a new subnet.
- **Remove** a subnet.
- **Edit** the IP address or subnet mask for an existing subnet.

ADVANCED TAB

From the Advanced tab you can define the following:

- Network Settings
- TCP/IP Name Resolution (DNS)
- Monitor to Database Settings

Figure 9-5 Advanced tab



NETWORK SETTINGS

These settings affect how Web Filter reacts to new users and destinations that are not yet categorized:

- **Lookup new users' friendly name** - If selected, when new users are detected by the Web Filter Monitor, their friendly name is retrieved from the domain controller.
- **Lookup new users' group details** - If selected, when new users are detected by the Web Filter Monitor, details of the groups that they are a member of are retrieved from the domain controller.
- **Block until categorized** - If selected, any destinations (including image searches) that haven't been categorized by Web Filter will be blocked until a categorization is given. Once a categorization is received, the destination will be checked against the rules you have in place, and viewed or blocked accordingly.

TCP/IP NAME RESOLUTION (DNS)

These settings affect how SurfControl Web Filter resolves Domain names:

- **Workstation name resolution** - Determines a workstation name based on IP address.
- **Site name resolution** - Provides DNS resolution for destination names.

SurfControl recommends you leave these settings cleared to increase performance. If you need workstation and site name resolution enabled, you must define the DNS settings on all Web Filter servers. It is critical that DNS requests from those servers do not time out or take an excessive time to respond.

MONITOR TO DATABASE SETTINGS

By default the Web Filter service writes data to flat files, which are then imported to the database automatically. The Monitor to Database settings enables you to configure this process. The options are:

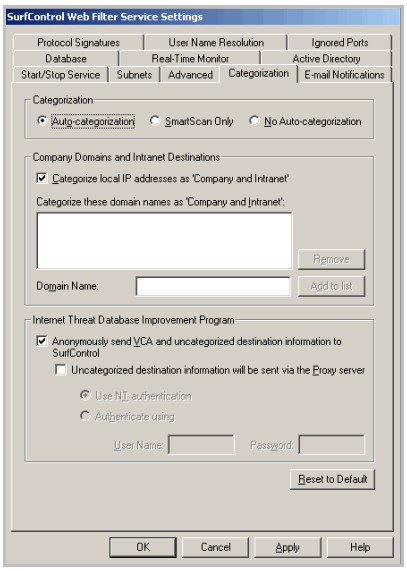
- **Automatic** (default setting) - Flat files are continuously imported into your database as they are created.
- **Manual** - Select this option to update the flat files to your database manually. This can be done in the following two ways:
  - Use the **Database Updater** tool. See "Updating Your Database" on page 134 for more details.
  - Schedule a database update event in the **Scheduler**. See "Database Update" on page 143 for more details.

SurfControl recommends using a scheduled event for updating your database. This ensures that your database is automatically kept up to date, without the need to perform a manual update.

CATEGORIZATION TAB

Web destinations seen by Web Filter are assigned to a category in the SurfControl Web Filter Internet Threat Database. The categorization tab enables you to configure how you want Web Filter to perform the categorization process. The Categorization Tab is shown below:

Figure 9-6 Categorization tab



CATEGORIZATION

Web Filter can categorize destinations in the following ways:

- **Auto-categorization** (Default Setting) - Enables all Categorization.
- **SmartScan Only** - Categorization of a URL will only take place against a list of keywords entered in the SmartScan dialog. See "Custom Categories" on page 68 for more details.
- **No Auto-categorization** - Disables all categorization.

COMPANY DOMAINS AND INTRANET DESTINATIONS

When installing Web Filter, the Configuration Wizard asked you to specify your company domains and intranet destinations. This is then used by Web Filter to categorize these as ‘Company & Intranet’. You can add, remove or change those destinations from here.

INTERNET THREAT DATABASE IMPROVEMENT PROGRAM

Uncategorized and VCA categorized destinations are sent anonymously to SurfControl. These are then analyzed, assigned to a SurfControl category and added to the Internet Threat Database. This helps SurfControl increase the filtering effectiveness for all customers. You have the option to choose whether to install this during the installation process. If you use a proxy server for internet requests, you can configure your authentication details for sending your information to SurfControl via your proxy server.

PROTOCOL SIGNATURES TAB

The Protocol Signatures tab gives you the ability to enable signature scanning for certain Instant Messenger, P2P and Web accelerator protocols. These protocols can establish connections with other devices outside your corporate network, on a range of different ports, and are therefore known to be port-agile. Web Filter monitors these protocols on specified static ports by default. If you enable protocol signature scanning, these protocols will also be monitored by signature.

Caution: Enabling Protocol Signature Scanning may have an impact on the performance of your Web Filter server.

After selecting **Enable Protocol Signature Scanning**, you can choose a type of scanning method to detect the Skype protocol:

- **Detect Skype on all ports** - This option is selected by default, and enables Web Filter to detect the Skype protocol by signature on all ports. This option provides a higher level of protection but increases the risk of falsely identifying other traffic as Skype. This option is recommended by SurfControl.
- **Detect Skype on standard ports only (HTTP, HTTPS)** - The Skype protocol will be detected by signature on ports 80 (HTTP) and 443 (HTTPS) only. This scanning method provides a lower level of protection, but decreases the risk of falsely identifying other traffic as Skype. To identify all possible Skype connections, you must ensure other ports are managed by your firewall.

A full list of protocols which can be monitored by signature, are outlined in the table below:

Table 9-1 Signature scanning protocols

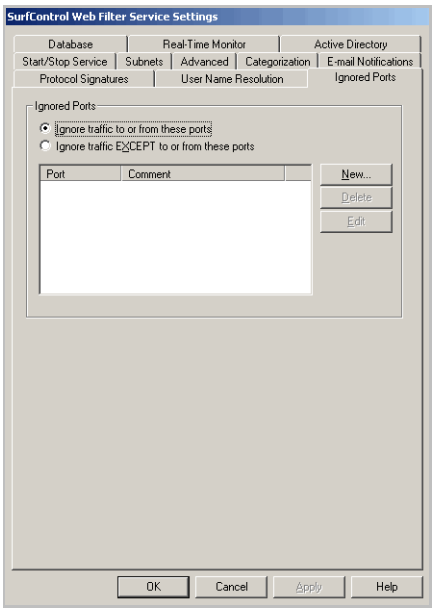
Application Type	Protocols
Instant Messaging	• MSN Messenger • OSCAR (AIM/ICQ) • XMPP (Jabber)
Peer to Peer (P2P)	• BitTorrent • eDonkey • FastTrack (Kazaa) • Gnutella • Skype • Yahoo! Messenger
Web	• Google Web Accelerator

IGNORED PORTS TAB

Web Filter detects network traffic through the driver and passes the information to the Web Filter service, even though you may have chosen not to monitor certain protocols in the monitor settings. To improve the performance of Web Filter, you can use the Ignored Ports tab to specify ports that you want the driver to ignore. This will result in network traffic using those ports, not being passed to the Web Filter service.

Note: If you have enabled Protocol Signature Scanning, all network traffic will be scanned for protocol signatures and if a signature is found, it will be used to determine whether the port is ignored.

Figure 9-7 Ignored Ports tab



Select one of the following options:

- **Ignore traffic to or from these ports** - This option will ignore all network traffic that use the ports in the Ignored Ports list.
- **Ignore traffic EXCEPT to or from these ports** - Select this option if you want to ignore all network traffic, apart from the specified port numbers in the Ignored Ports list.

CREATING NEW PORTS

You can add either single ports or a range of ports to the Ignored Ports list. To create a new port entry:

1 On the Ignored Ports tab, click **New**.

2 In the Ports dialog that follows, select one of the following options:

- **Single Port** - Enter a single port number.
- **Port Range** - Enter a range of port numbers. For example, to allow the Web Filter driver to ignore or acknowledge FTP network traffic, enter a range of 20 - 21.

3 Optionally enter a description into the **Comment** text box, and click **OK** to save your changes, or click **Cancel** to abort.

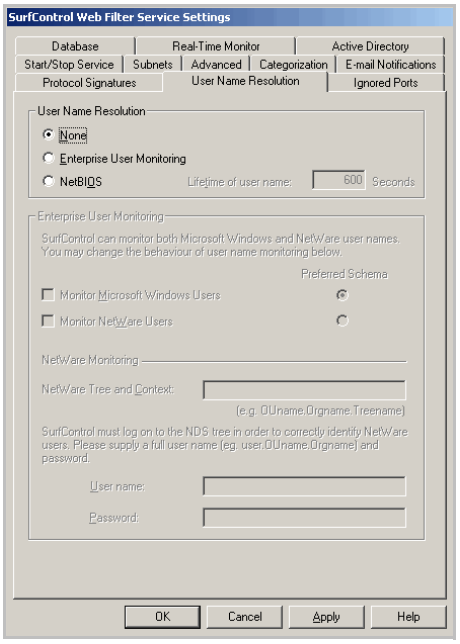
You can also perform the following actions:

- **Delete** - Removes a selected port number or port range from the list.
- **Edit** - Launches the **Ports** dialog box to change details for a selected port, or port range in the list.

USERNAME RESOLUTION

The User Name Resolution tab allows you to configure how Web Filter detects user names:

Figure 9-8 User Name Resolution tab



The tab is split into two sections:

- Username Resolution
- Enterprise User Monitoring

These settings affect how Web Filter monitors users:

- **None** - If selected, SurfControl monitors users based on workstation name or IP address.
- **Enterprise User Monitoring (EUM)** - If you have installed EUM, this option will be selected by default. SurfControl recommends the use of EUM for user name resolution. See the *Starter Guide* for details on how to install EUM.

Note: If you install EUM in a NetWare environment, Enterprise User Monitoring is not selected by default. You need to manually select it.

- **NetBIOS** - Based on the MAC address of the workstation.
- **Lifetime of user name** - This field is used by NetBIOS only. This determines how often Web Filter should check each workstation for active users. The default value is 600 seconds.

ENTERPRISE USER MONITORING

If you choose to use EUM after installation, the options in this section enable you to configure how to monitor user names in a NetWare environment. If you chose to monitor by EUM during installation, the NetWare Tree and Context details you entered in the Configuration Wizard will be shown, but will not be editable.

Note: These settings will only be available if the NetWare client has been installed. SurfControl recommend installing the NetWare client before installing Web Filter. See Chapter 2 of the Starter Guide for details.

- **Preferred Schema** - You can monitor by both Windows and NetWare users. You can select your preferred schema.
- **NetWare Monitoring** - If monitoring by NetWare user names, you need to enter the following details.
  - **NetWare Tree and Context** - You need to enter your NetWare Tree and Context information in this field. (For example: OUname.Orgname.Treename).

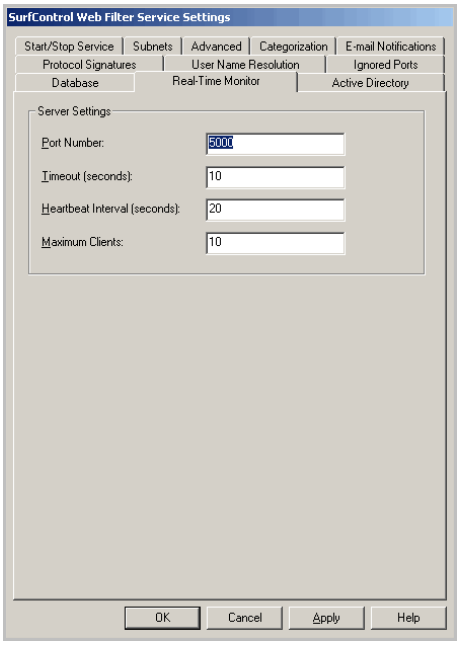
Caution: Ensure these details are entered correctly, as this information can not be edited afterwards.

  - **NDS tree Username and Password -** Web Filter requires a valid NDS tree username and password to be able to monitor NetWare users. For example: User.OUname.Orgname.

REAL-TIME MONITOR TAB

This tab displays the connection details for the Real-Time Monitor.

Figure 9-9 Real-Time Monitor Settings



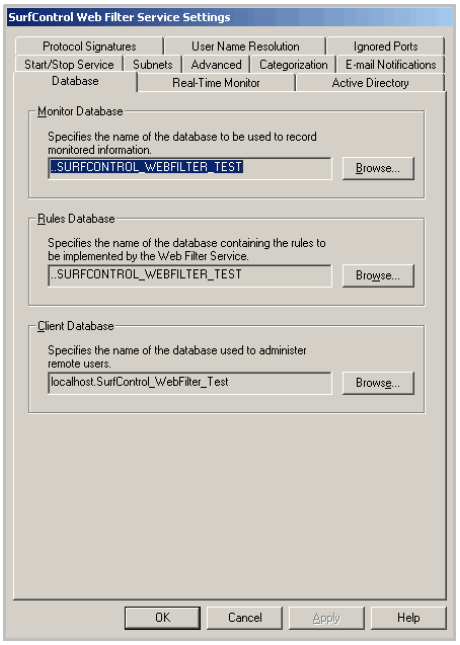
The settings are:

- **Port Number** - This is the port that the Real-Time Monitor connects to the Web Filter service on. The default number is 5000. This port number must be the same as in the Collector Details dialog box in the Real-Time Monitor. See page 94 for more details.
- **Timeout (seconds)** - If the connection to the server is lost, this is the time that the Real-Time Monitor will try re-connecting to the server before timing out and reporting an error.
- **Heartbeat Interval (seconds)** - The Web Filter service will send an ‘I’m here’ message to the Real-Time Monitor. The Real-Time Monitor will then send one back. This setting is the interval between receiving a message and returning it. If no message is received by the Real-Time Monitor it assumes that the connection to the Web Filter service has stopped.
- **Maximum Clients** - The maximum allowed number of Real-Time Monitor connections to the server at any one time.

DATABASE TAB

The Database tab shows the current database being used for Monitoring, and Rules and Clients in Web Filter. The default database name is SurfControl_WebFilter.SurfControl recommends you **do not** have separate databases for Monitoring and Rules. For more information about Mobile Filter remote users, consult the Mobile Filter Administrator's Guide.

Figure 9-10 Database tab

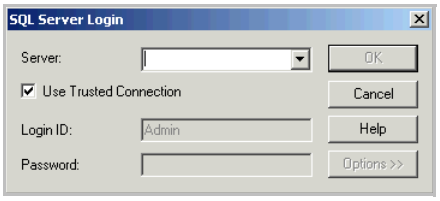


To change the Web Filter Database:

1 Stop the service.

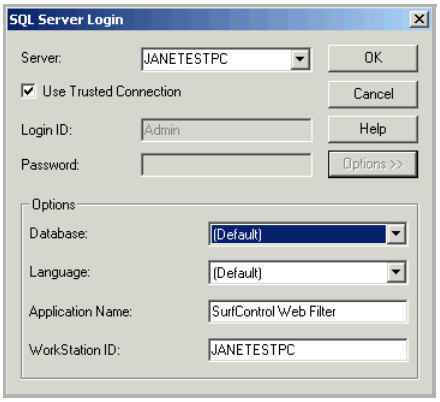
2 In the **Database** tab, click **Browse** alongside the type of Database you want to change.

A SQL Server Login dialog box is displayed. The **Use Trusted Connection** option is selected by default. If you want to use a SQL Server Login ID and Password, clear this option and enter the details in the relevant fields.



3 Select the server you want to connect to from the Server list. The **Options** button will become enabled.

4 Click **Options** to expand the login dialog box.



5 Select the database you want to connect to.

6 Add an Application Name to identify the database and click **OK**.

7 Click **Apply**.

8 Start the service.

E-MAIL NOTIFICATIONS TAB

During installation you were asked to give the following information about the Systems Administrator:

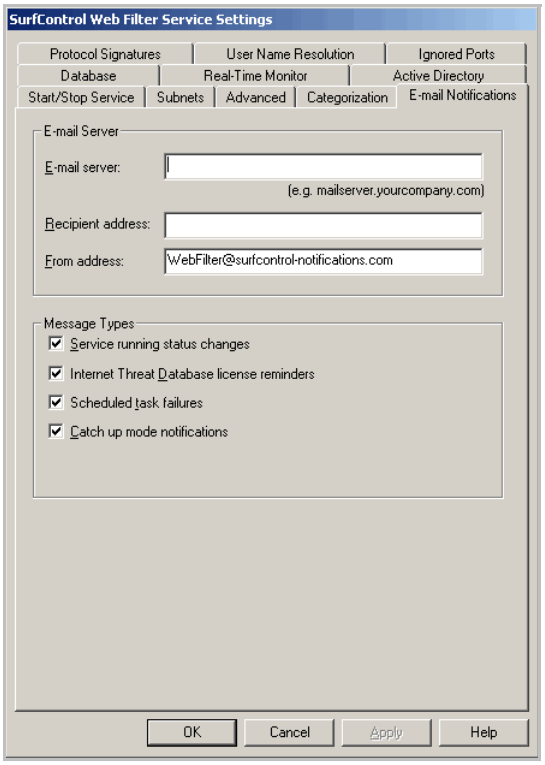
- E-mail Server
- Recipient Address
- From Address

You were also asked to select from the following message types that the System Administrator should receive alerts about:

- **Service running status changes** - If the Web Filter or Scheduler service is stopped or started.
- **Internet Threat Database license reminders** - A reminder will be sent when a subscription to the Internet Threat Database is due for renewal. A reminder will be sent a month from expiry, then a week from expiry, and a day from expiry. Once a subscription has expired a reminder will be sent every 24 hours.
- **Scheduled task failures** - If any scheduled task does not complete.
- **Catch up mode notifications -** If the service becomes overloaded, monitoring will be restricted to HTTP traffic. If the overload becomes critical, monitoring will be temporarily suspended. An e-mail will be sent when Web Filter enters and exits catch up mode.

You can select these options on the E-mail Notification tab as shown below:

Figure 9-11 E-mail Notification tab



There are three other e-mail alerts that the recipient address will receive:

- **Unlicensed product reminders** - If you are still using an unlicensed product past its thirty day trial period, you will be sent daily reminders.
- **Internet Threat Database category changes** - Made by the SurfControl Global Threat Experts. The Global Threat Experts may dynamically add new categories to the Internet Threat Database. This e-mail will inform you of any additions that have been made.
- **Seven day reminder** - If it is more than a week (seven days) since an Internet Threat Database update.

Chapter 10

Custom Categorization

Introduction . . . . . page 118
How It Works . . . . . page 118
Using Custom Categorization . . . . . page 119
List of Destinations Tab . . . . . page 119
VCA Settings Tab . . . . . page 121
VCA Results Tab . . . . . page 122
The VCA Service Settings. . . . . page 124

INTRODUCTION

Custom categorization uses SurfControl's Virtual Control Agent™ (VCA) technology. The VCA evaluates unknown Web destinations, reading and analyzing content page by page. It then uses cutting-edge artificial intelligence algorithms to study and classify each Web page into one of the SurfControl Web Filter categories. This allows sites initially shown as 'Uncategorized' in the Monitor to be categorized more meaningfully.

HOW IT WORKS

1 The VCA collects a representative number of pages and analyzes their content.

2 The VCA's Neural Network compares the page and site with other sites in the SurfControl Web Filter categories.

3 It then puts the site into the category that it most resembles. For more details on SurfControl's categories, see "Category Object" on page 67.

THE VCA IN EVALUATION MODE

If you are using Web Filter in evaluation mode, none of the custom categorization changes made by the VCA will be stored to the database. You can perform a categorization run and view the results, but these will not be saved to the database.

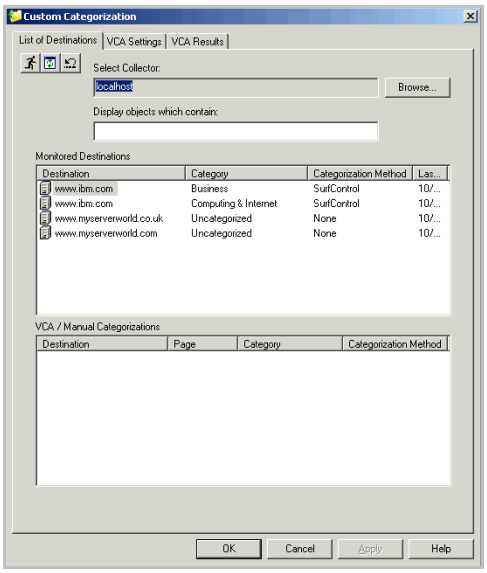
USING CUSTOM CATEGORIZATION

To open the **VCA** from the **Web Filter Manager**, select **Content Protection > Custom Categorization** from the appropriate collector or database in the **Navigation** tree, or from the shortcut button within the other SurfControl Web Filter components. Custom Categorization is also available from the **Start > All Programs > SurfControl Web Filter** menu.

LIST OF DESTINATIONS TAB

The default view is the List of Destinations tab as shown below:

Figure 10-1 List of Destinations tab



1 In the **Select Collector** text box, enter the name of the database which is currently in use for VCA runs, You can click **Browse** to connect to another SurfControl Web Filter server (Collector).

2 The **Display objects which contain** text box can show the database currently in use for VCA runs. Enter part or all of a URL to search the VCA List of Destinations for a particular destination or group of destinations.

3 Click one of the following buttons to perform a task:

- **Categorize all Uncategorized Destinations** - Starts the VCA categorization process.
- **Refresh List** - Used to refresh the destinations list in the VCA.
- **Set all destinations back to unchecked** - In each run the VCA attempts to categorize all 'Uncategorized' unchecked destinations. However if the destinations have already been checked in a former run the VCA will not attempt to re-categorize these. Use Set all destinations back to unchecked to set destinations back to the 'unchecked' state that they were in previously. The VCA will then attempt to categorize the ‘Uncategorized’ destinations again in the next run. This action only applies to ‘Uncategorized’ destinations.

The **Monitored Destinations** panel shows the current list of destinations in the Monitor database. Click any of the column headings to sort by that data.

- **Destination** - Shows the URL for a categorized destination.
- **Category** - Shows the VCA category for the URL.
- **Categorization Method** - The sources of categorization are as follows:
  - **Company & Intranet** - The destination is specified within the Categorization tab of the Web Filter settings as a company domain or Intranet site. ("Categorization Tab" on page 106).
  - **Manual** - The administrator has manually set the category of the site. The category could have been set to one of the SurfControl defined categories or a custom category. ("Category Object" on page 67).
  - **SurfControl** - The site was categorized from the SurfControl Internet Threat Database.
  - **VCA** - The destination was categorized by the Virtual Control Agent.
  - **None** - The site was not assigned a category.
- **Last Access** - The date the destination was last visited.

The **VCA / Manual Categorizations** panel shows any destinations that have been re-categorized, either by the VCA or by yourself from the **Monitored Destinations tab** in the **Web Filter Manager**. See "Monitored Destinations tasks" on page 47 for more details on manually categorizing a destination originally set as ‘Uncategorized’.

- **Destination** - Shows the URL for a categorized destination.
- **Page** - Shows the page level information for the destination.
- **Category** - Shows the VCA category for the destination.
- **Categorization Method** - The sources of categorization are as follows:
  - **Manual** - The administrator has manually set the category of the destination. The category could have been set to one of the SurfControl defined categories or a custom category. (See "Category Object" on page 67 for more details).
  - **VCA** - The destination was categorized by the Virtual Control Agent.
- **Language** - The language the destination was categorized in. See "VCA Settings Tab" on page 121 for details on the languages the VCA can categorize in.

Right-clicking any destination in the Monitored Destinations or VCA / Manual Categorizations panels launches a menu with the following options.

- **Categorize Selection** - Perform a VCA run on the selected destination.
- **Set Category** - Manually set the category from the SurfControl Category list.
- **Uncheck Selection** - Removes the Checked status from a destination, which will then be checked again in a VCA run.
- **Remove Categorization** - This option is only available in the VCA / Manual Categorizations panel. This removes the manual categorization of a destination.
- **Go To HTTP** - Opens the selected site in a Web browser.

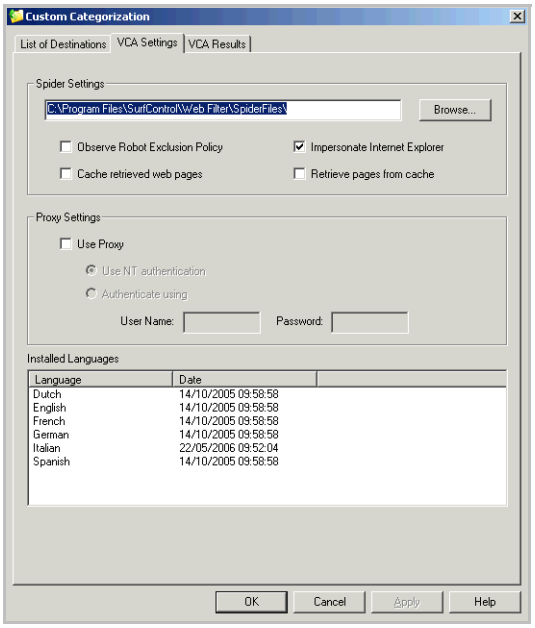
- **Find Destination** - Allows you to search for a URL in the Monitored Destinations or VCA / Manual Categorizations panels.

VCA SETTINGS TAB

To configure settings for the VCA:

1 In the **Custom Categorization** dialog, click the **VCA Settings** tab.

Figure 10-2 VCA Settings tab



2 Select the location of the Spider Files in the **Spider Settings** text box. In a default installation the location will be:

C:\Program Files\SurfControl\Web Filter\SpiderFiles

This setting can also be changed via the VCA Control Panel application. See "The VCA Service Settings" on page 124 for more details.

3 You can select any of the following options:

- **Observe Robot Exclusion Policy** - Some destinations contain a text file that describes exactly what each spider (or robot) can access on the destination. If you choose to ignore this policy then the spider will try to access unauthorized areas on the destination. This may result in your IP address being banned by the destination.
- **Cache retrieved web pages** - Adds any pages directly retrieved during the VCA run to the local web page cache, if available.
- **Impersonate Internet Explorer** - The VCA will identify itself as Internet Explorer when making requests to servers. If you clear this item the VCA will identify itself as SurfControl. Some destinations are inaccessible unless you impersonate Internet Explorer, although destinations can also ignore requests that originate from Internet Explorer. This option is selected by default.

- **Retrieve pages from cache** - Enables the VCA to use locally cached versions of pages of a destination, rather than having to retrieve current versions from the Internet.

4 Select **Use Proxy**, if you are using a Proxy server. Select **Use NT Authentication** to enable you to access the Proxy server as part of an NT Domain. This option is selected as default if the Proxy Server option is selected. Select **Authenticate Using** if you do not want to use NT Authentication. Type in a user name and password to access the Proxy server.

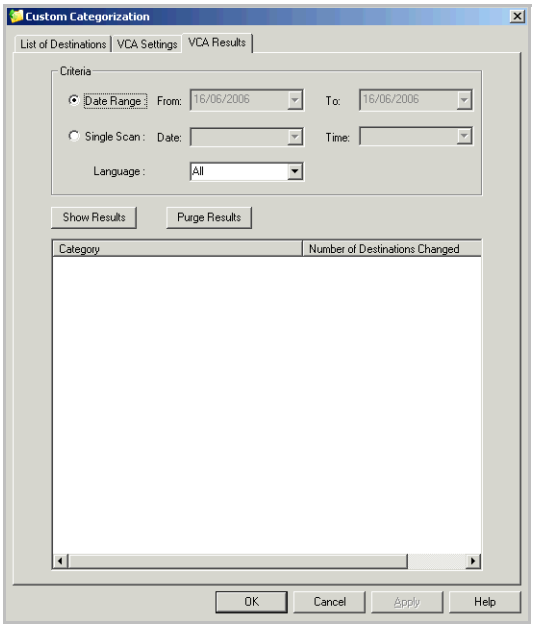
The **Installed Languages** section displays languages that the VCA can categorize in.

VCA RESULTS TAB

To view the results of VCA runs, perform the following:

1 In the Custom Categorization dialog, click the VCA Results tab.

Figure 10-3 VCA Results tab



2 Select one of the following options:

- **Date Range** - Choose a **From** and **To** date if you want to report on a range of days.
- **Single Scan** - Select this option and choose a single date and a time to run a scan on from the drop-down list boxes.

3 Choose a specific language to run reports on from the drop-down list box. This will return destinations in the language specified. The default setting is All. These are:

- Dutch
- English
- French
- German

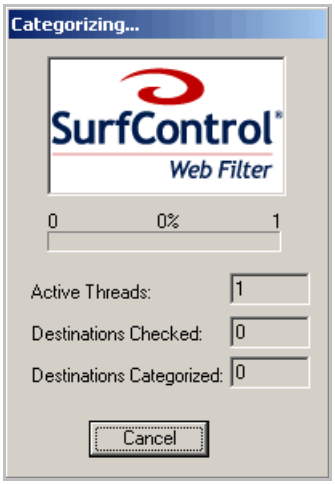
- Italian
- Spanish

4 Select **Show Results** to view the results in the window below, or **Purge Results** to remove the results from the window below.

To perform a Categorization run:

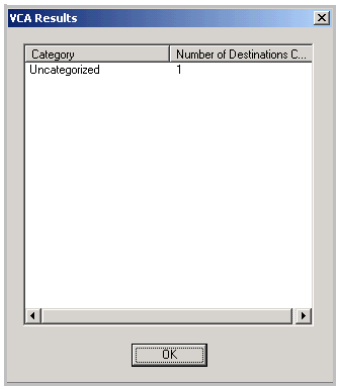
1 From the **List of Destinations** tab, click **Categorize all Uncategorized destinations**

A **Categorizing** dialog box displays with the following information:



- A Progress bar showing the number of 'Uncategorized' destinations being categorized on the right and the percentage of those destinations processed.
- Active Threads are the number of pages being categorized at any one time. You can limit the amount of active threads being used for this in the Virtual Control Agent Control Panel application.
- Destinations Checked counts the number of destinations checked during the VCA run.
- Destinations Categorized is the number of destinations that have been categorized by the VCA during this run.

2 Click **Cancel** to stop the VCA run at any time. On completion of the run, a **VCA Results** dialog box shows the VCA categorized destinations and the category to which they have been assigned:



3 Click **OK**. An **Action Complete** dialog box displays, confirming the number of destinations checked and Categorized.

4 Click **Close**.

THE VCA SERVICE SETTINGS

The VCA Control Panel application enables you to stop and start the VCA service and configure VCA service settings, as shown in the figures below.

Note: The VCA service does not function if you are using a 30 day evaluation version of Web Filter.

Figure 10-4 VCA Service Control tab

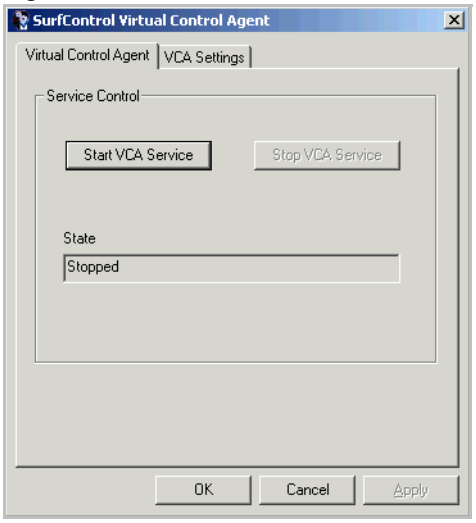
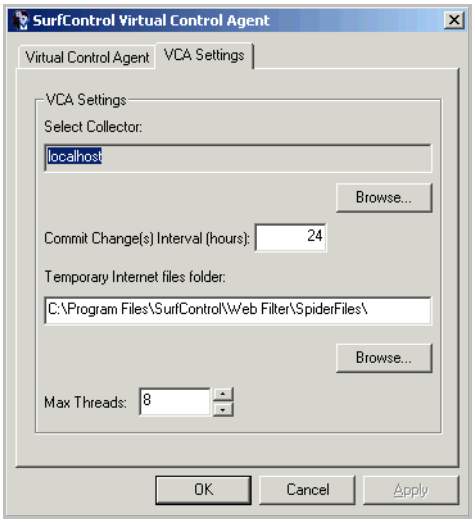


Figure 10-5 VCA Settings tab



You can perform the following tasks on the VCA Settings tab:

- **Select Collector** - Select the server (collector) you want the VCA to save its categorizations to. By default, the collector is set to **localhost**. In this instance, the VCA service will use a trusted connection and the local system account to connect to the local collector. If you want to save VCA categorizations to a remote collector, you will need to set up a separate user account and manually configure the VCA service to run using this account. (The VCA service will not connect to a remote collector if it is configured to use a trusted connection and to log on with the local system account). To configure the service to log on using a different account, perform the following:

  i Click **Start**, point to **Administrative Tools** and click **Services**.

  ii Double-click **SurfControl Virtual Control Agent** in the services list.

  iii Click the **Log On** tab and select **This account**.

  iv Enter the user name and password the VCA service will use to connect to the remote collector, and click **OK**.

  v Restart the VCA service.

  vi Open the VCA Control Panel application and click the **VCA Settings** tab.

  vii Click **Browse** and type in the ip address or hostname of the server that will act as the remote collector, and click **OK**.

- **Commit Change(s) Interval (hours)** - You can configure the time in hours before the VCA will commit changes to the selected database and flush its cache.
- **Temporary Internet files folder** - The VCA spiders will download up to 10 pages of a destination it is categorizing. It downloads them to the folder specified in this field. By default this location is:

  `C:\Program Files\SurfControl\Web Filter\SpiderFiles`

  Once the spiders have finished categorizing the destination, the pages are deleted from the folder. This setting can also be changed from within the VCA. See page 121 for more details.

- **Max Threads** - This controls the maximum number of spiders that can be categorizing destinations at any one time. The default number is 8. The maximum is 32. Increasing the number of spiders can use up your available bandwidth. For this reason SurfControl recommends you keep this setting at its default number.

Chapter 11

Databases

Creating a New SQL Server Database . . . . . page 128

Managing databases . . . . . page 129

Updating Your Database . . . . . page 134

Upgrading your database . . . . . page 136

Importing/exporting databases . . . . . page 137

CREATING A NEW SQL SERVER DATABASE

If you wish to create a new SQL Server database for Web Filter, use the SurfControl Database Creation Wizard. Before you can use the Wizard, check the following:

- You must have installed a complete or client version of Web Filter.
- You must have installed Microsoft SQL Server (usually on its own server).
- The SurfControl server must have network access to the SQL Server.
- There must be a user account on the SQL Server with a Database Creators role.

Note: A SurfControl database should only have one database owner.

To create a new SQL Database:

1 From the **All Programs > SurfControl Web Filter > Database Tools** menu select **Create SQL Server Database**. The Create SurfControl Web Filter Database Wizard will start.

2 Click **Next**.

3 Enter the name of the SQL Server and the proper authentication:
   - For Windows authentication, select **Use Trusted Connection**.
   - For SQL authentication, leave **Use Trusted Connection** deselected.
   - Enter the SQL Administrator **Username** and **Password**.

4 Click **Next**.

5 Enter the name of the database.
   - If you deselect **Use Default Locations**, specify the locations for the database and transaction log files.
   - If you deselect **Set as SurfControl Web Filter Default**, specify the new database for both the Rules and Monitor databases.

6 Click **Next**.

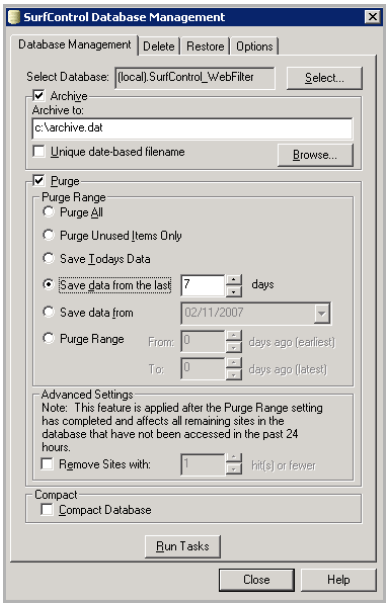
7 Click **Finish**. The new database will appear in the **Web Filter Manager Navigation** tree.

To use the new database in a multiple installation environment you must select the new database from the Web Filter service. See "Database Tab" on page 112 for more details.

MANAGING DATABASES

As SurfControl Web Filter builds up its database of Internet traffic, you need to consider how to manage the volume of data it contains. Web Filter has a database management tool that enables you to manage your data efficiently.

Figure 11-1 The Database Management Tool



With this tool you can perform the following tasks on your databases.

- Archive
- Purge
- Compact
- Delete
- Restore

The tool is available from the **Web Filter Manager > Maintenance > Database Management** for the appropriate collector or database in the **Navigation** tree. The Purge, Archive and Compact options can also be set up as events in the **Scheduler**. See "Database Management" on page 142 for more details on setting up these tasks in the Scheduler.

When you installed Web Filter you could choose to set up an automatic Archive followed by Purge scheduled event. This event is configured to run once a month. You can configure the settings for this event by selecting it in the Scheduler and clicking Configure.

Note: You can set up tasks to run individually or you can configure the Database Management tool to perform an Archive, Purge and Compact task at the same time.

ARCHIVE

Archiving your database, improves system performance by reducing its size and optimizing storage. To perform an archive of your database:

1 Select **Database Management** from the **Web Filter Manager > Maintenance** from the appropriate collector or database in the **Navigation** tree.

2 Select the **Archive** check box from the Database Management tab.

3 Click **Browse** and specify a location to save the archived database to.

The default location is drive C, but you may want to specify a different location, to prevent the archive file being overwritten the next time you archive your database.

4 Choose **Unique date-based filename** to save you overwriting an existing archive file.

5 Click **Run Tasks** to begin the Archive.

If you have left all the options at their default settings, with all check boxes clear, you will archive your whole database to `C:\Archive.dat`.

PURGE

Purging your database reduces its size by removing connection details for users, sites and groups. You can purge your database in various ways from the Purge tab.

To Purge the Database:

1 Select **Database Management** from the **Web Filter Manager > Maintenance** from the appropriate collector or database in the **Navigation** tree.

2 Select the **Purge** check box from the **Database Management** tab.

3 Choose from the following purge options:

- **Purge All** - Removes all connection details.
- **Purge Unused Items Only** - Removes connection details that are no longer necessary.
- **Save Today's data** - Removes all but that day's connection details.
- **Save data from the last "N" days** - Where "N" is the number of days to retain connection details.
- **Save data from DD/MM/YY** - Removes all connections details before the date specified.
- **Purge Range** - Removes all connections for the specified range.
- **Advanced Settings** - You can choose to remove sites which have not been accessed in the last 24hrs, but are outside of the purge range. Select the **Remove Sites with** checkbox and set the number of hits. Sites will be removed that have less than, or equal to, the number of hits specified. The Advanced Settings are not available if you have selected **Purge All** or **Save Todays** data.

Note: Manually categorized sites that meet the Advanced Settings criteria will not be deleted

4 Click **Run Tasks** to start the Purge.

COMPACT

Compacting your database eliminates the redundant space contained within it, reducing its size.

To Compact a Database:

1 Select **Database Management** from the **Web Filter Manager > Maintenance** from the appropriate collector or database in the **Navigation** tree.

2 Select the **Compact Database** check box from the **Database Management** tab.

3 Click **Run Tasks**. A progress dialog box will appear.

DELETE

Use the Delete tab to permanently delete a database from your system.

To Delete a Database:

1 Select **Database Management** from the **Web Filter Manager > Maintenance** from the appropriate collector or database in the **Navigation** tree.

2 Select the **Delete** tab:

3 The current database will be shown in the database field. If you want to delete another database, click **Select** to choose another via the SQL Server Login dialog box.

4 Click **Delete Now**.

RESTORE

Restore enables you to view and report on an archived database using the SurfControl Web Filter Monitor.

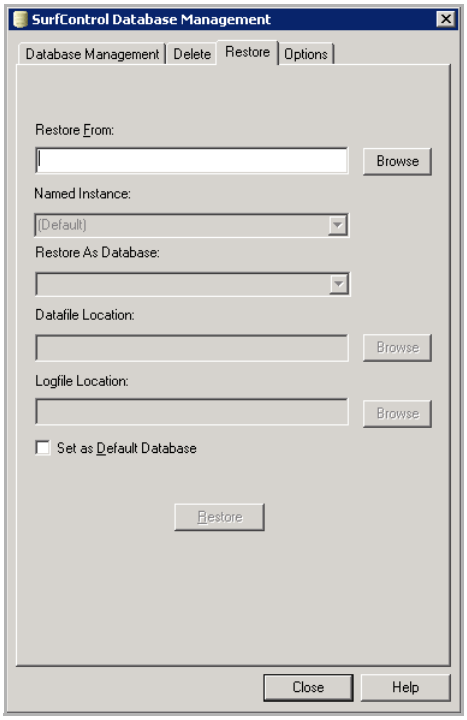
Note: You can only restore local SQL databases.

To Restore an Archived Database:

1 Stop the Web Filter service.

2 Select **Database Management** from the **Web Filter Manager > Maintenance** from the appropriate collector or database in the **Navigation** tree.

3 Select the **Restore** tab:



4 Click **Browse**.

A Restore from Archive dialog box will appear. The default location for your archived databases is drive C. If you archived your database to another location, use **Browse** to locate it.

5 Click **Open** on the relevant file. The Restore tab fields will now be populated with information from the archived database.

6 Enter a name in the **Restore As Database** field. The **Restore** button becomes enabled.

Note: The **Named Instance** field is required for restoring databases to **SQL Server Express**. You can also use this to specify an instance of SQL Server, if you have multiple installs of SQL Server 2000 or above on the same computer.

7 Select **Set as Default Database** for the Web Filter service to use the restored database for writing to.

8 Click **Restore**. A message displays, confirming the restore has been successful.

9 Click **OK**.

10 Start the Web Filter service.

OPTIONS

The Options tab enables you to set a timeout value in seconds for your database. If a database maintenance task cannot establish a query to the database within the time set, the task will be cancelled.

To change the Database Query Timeout:

1 Stop the Web Filter service.

2 Select **Database Management** from the **Web Filter Manager > Maintenance** node, in the appropriate collector or database of the **Navigation** tree.

3 Select the **Options** tab:

4 Enter a value for your database query timeout.

5 Click **Apply**.

Note: For larger databases, SurfControl recommends setting this value to 3600 seconds.

UPDATING YOUR DATABASE

There are two methods for manually updating the database from the flat files that are created by the Monitor. You can set up a scheduled event (see "Database Update" on page 143), or you can perform a manual update with the Database Updater tool.

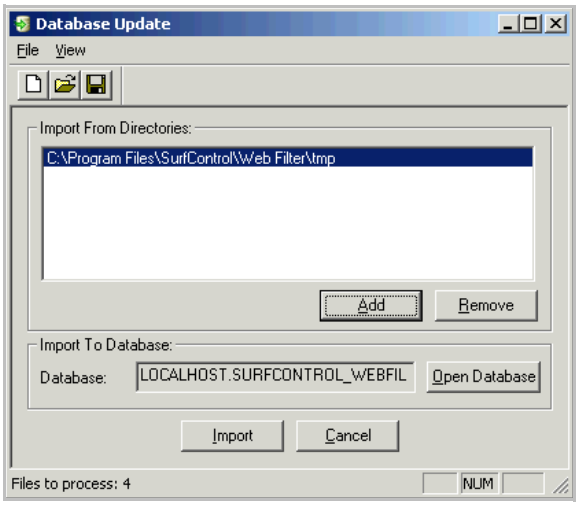
Caution: The Database Updater Tool will not run if the Web Filter service is running and Monitor to Database is set to Automatic.

To perform a Manual Database Update:

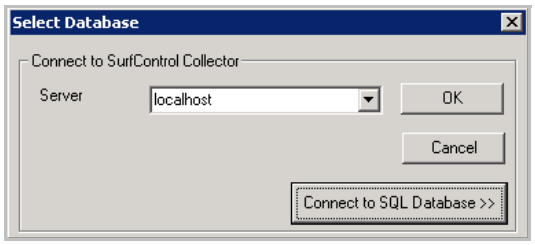
1 Stop the Web Filter service.

2 From the **Web Filter Manager**, select **Maintenance > Database Updater** from the appropriate database in the Navigation tree or select **Start > All Programs > SurfControl Web Filter > Database Tools > Database Updater**. The Database Updater dialog is displayed.

3 Click **Add** to select a flat file. The default location for flat files is: C:\Program Files\SurfControl\Web Filter\TMP:

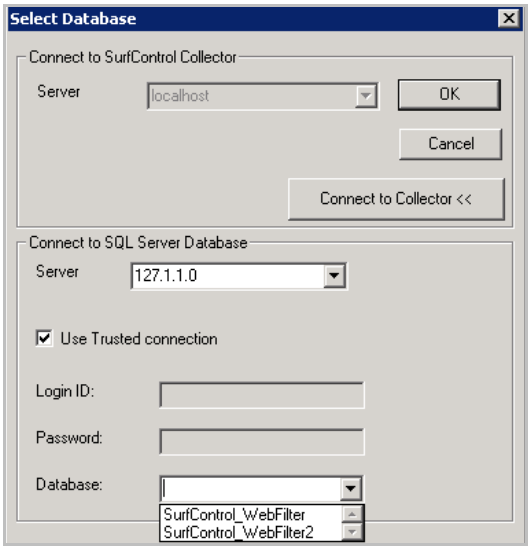


4 Click **Open Database**. You will see the Select Database dialog box showing the default database:



5 Click **OK** to update this database. If you wish to update another database click **Connect to SQL Database**.

6 Select the Server that contains the database from the drop down list box:



7 If the server requres a Login ID and Password enter this information to log into the server. If the server does not require this information select the **Use Trusted connection** check box then select the database you wish to update from the Databases list box.

8 Click **OK**. This will close the Select Database dialog.

9 Click **Import** to update the database.

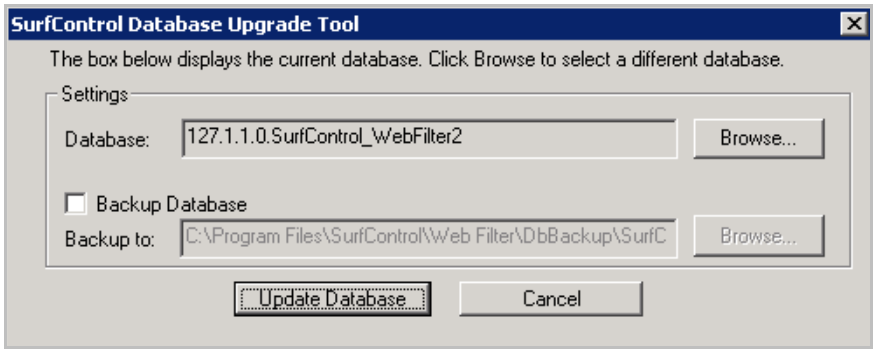
10 Click **Save**. This will save the Flat File location and Database information. You need to specify a name and a location for the update criteria file.

11 Restart the Web Filter service.

UPGRADING YOUR DATABASE

1 Download the latest database from the SurfControl web site.

2 Select **Start > All Programs > SurfControl Web Filter > Database Tools > Database Upgrade Tool**. You will now see the SurfControl Database Upgrade Tool:



3 You will see the current database in the **Database:** field. Click **Browse** to navigate to the database that you downloaded.

4 SurfControl recommends that you back up your old database before replacing it with a newer version. Select the Backup Database check box then:

- Leave the default path in the **Backup to:** text field.
  OR
- Click **Browse** to enter the path to a new directory.

5 Click **Update Database**.

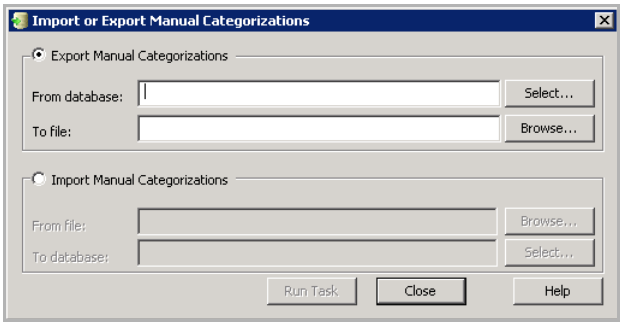
IMPORTING/EXPORTING DATABASES

If you have categorized sites manually you can import these sites from an existing database, then export to these sites to a new blank database. This can useful for creating backups of manual categorizations, or for adding these sites to a new database without having to manually categorize them again.

EXPORTING MANUALLY CATEGORIZED SITES

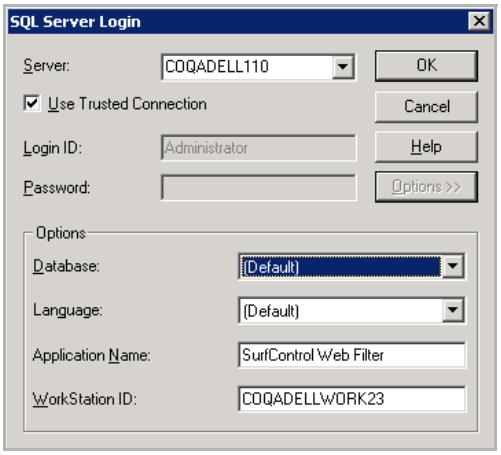
To export your manual categorizations:

1 Select **Start > SurfControl Web Filter > Database Tools > Import or Export Manual Categorizations**. You will see the Import or Export Manual Categorizations dialog:



2 Select the **Export Manual Categorizations** option.

3 Click the **Select** button. A SQL Server Login dialog will be displayed:



4 Use this dialog to select the database containing the manually categorized sites that you want to export by choosing the server from the **Server** drop-down list box then selecting the **Use Trusted Connection** check box. Alternatively enter a user name and password if this server requires one.

5 Use the Options section to select the database that you wish to use then click **OK**. The information relevant to that database will appear in the **From database** text field.

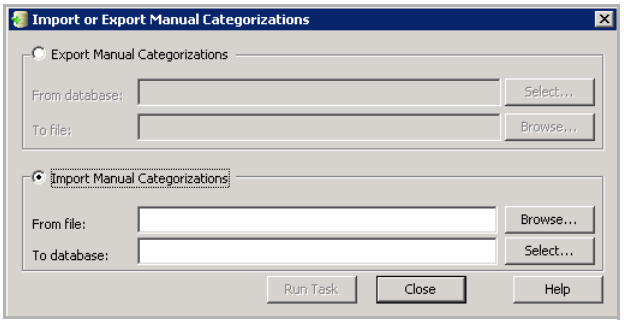
6 Click **Browse** and navigate to the flat file that you wish to export the manually categorized sites to.

7 Click **Run task** to export the sites to this file.

IMPORTING MANUALLY CATEGORIZED SITES

To import your manual categorizations:

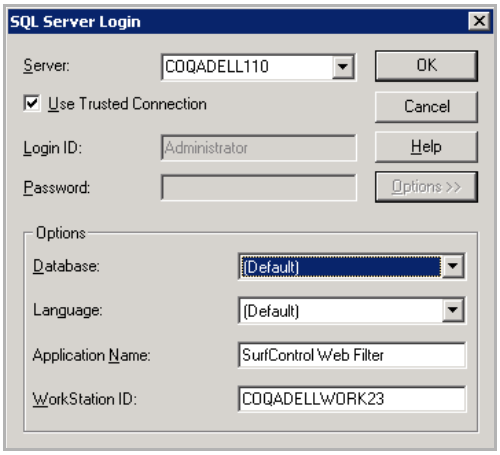
1 Select **Start > SurfControl Web Filter > Database Tools > Import or Export Manual Categorizations**. You will see the Import or Export Manual Categorizations dialog:



2 Select the **Import Manual Categorizations** option.

3 Click the **Browse** button and navigate to the flat file that contains your manually categorized sites. This could be a file containing sites that you exported earlier. The path will appear in the **From file** text field.

4 Next click the **Select** button. A SQL Server Login dialog will be displayed:



5 Use this dialog to select the database that you want to import the sites to by choosing the server from the **Server** drop-down list box, then selecting the **Use Trusted Connection** check box. Alternatively enter a user name and password if this server requires one.

6 Use the Options section to select the database that you wish to import the sites to, then click **OK**. The information relevant to that database will appear in the **To database** text field.

7 Click **Run task** to import the sites to this database.

Chapter 12

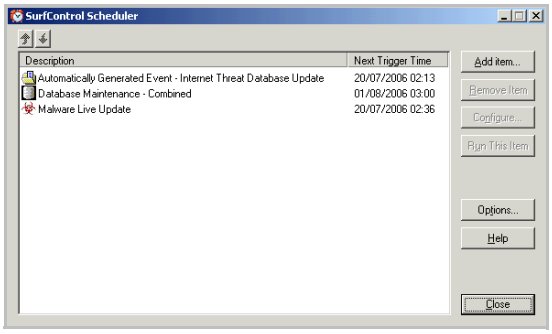
Scheduler

Introduction . . . . . page 140
Available Events . . . . . page 142
Command Line. . . . . page 142
Database Management . . . . . page 142
Database Update . . . . . page 143
Internet Threat Database Update . . . . . page 144
Network Groups Update . . . . . page 144

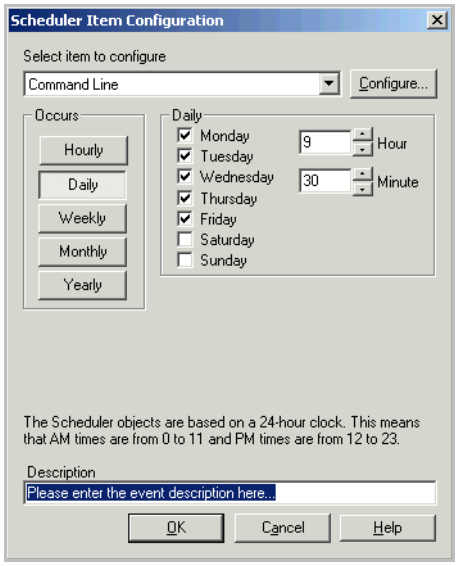
INTRODUCTION

You can schedule certain events that consume high bandwidth or that need users to be logged off the network to take place at a convenient time. To Schedule an event:

1 From the Web Filter Manager, select **Maintenance** > **Scheduler** from the appropriate collector or database in the Navigation tree. The Scheduler is also available from the **Start** > **All Programs** > **SurfControl Web Filter menu**.



2 Click **Add Item**. The **Scheduler Item Configuration** dialog box displays.



3 Select the event you want to configure from the **Select item to configure** list.

4 Select when you want the event to occur:

- Hourly
- Daily
- Weekly
- Monthly
- Yearly

Further options are available depending on the frequency chosen.

5 Enter a name for the event in the Description field.

6 Click **Configure**. Depending on the event chosen, a dialog box will appear.

7 Once you have completed the details in the dialog box, click **OK**.

8 Click **OK** in the Item Configuration dialog box. Your event should now be listed in the Scheduler main dialog box.

AVAILABLE EVENTS

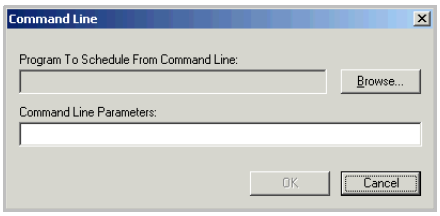
You can set up the following events in the Scheduler:

- Command Line
- Database Management
- Database Update
- Internet Threat Database Update
- Network Groups Update

COMMAND LINE

Command line items such as batch routines can be scheduled to run. The following dialog box displays when you click **Configure** from the Scheduler Item configuration dialog box:

Figure 12-1 Command Line Configuration dialog box



Click **Browse** to locate the required file. Enter any required Parameters in the **Command Line Parameter** box and Click **OK**.

DATABASE MANAGEMENT

Choosing this option enables you to set up a scheduled event that will Archive, Purge or Compact your database. For detailed information on setting up these events, see "Managing databases" on page 129.

You can set up a separate event for each routine, or create a combined event for the routines you want to schedule.

Note: When you installed Web Filter you could choose to set up a combined Archive and Purge scheduled event. This event is configured to run once a month. You can configure the settings for this event by selecting it in the Scheduler and clicking Configure.

To schedule Database Management events:

1 Select **Database Management Tasks** from the **Select item to configure** list.

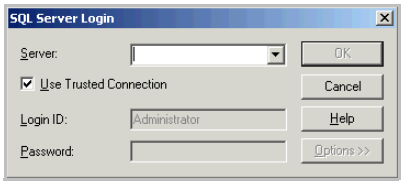
2 Set the date and time for when the database management task will occur, using the Occurs sections.

3 Enter a name for your event in the **Description** field.

4 Click **Configure**. The Database Management dialog box will be displayed. The default database is shown in the Database field.

5 If you wish to run the event on a different database, click **Select** to choose a different database. A SQL Server Login dialog box displays.

6 Select an available Server from the **Server** list.



7 Click **Options** and select the database you want to use from the drop-down list box. The database selected will be retained by the Database management settings.

8 Click **OK**.

DATABASE UPDATE

If you have selected to update the flat files into your database manually, you can schedule this at a time that best suits your network. See "Advanced Tab" on page 104 for more details on database update settings.

Caution: Do not schedule flat file updates from multiple collectors to take place at the same time. This can corrupt your database.

To schedule a flat file import to your database:

1 Click **Add** to navigate to the folder where your flat files are located. Click **Remove** if you want to delete a location. Flat files are stored in the following folder by default:

C:\Program Files\SurfControl\Web Filter\tmp

2 Click **Open Database**. You have two choices:

- Choose a SurfControl Collector from the drop-down list box then click **Connect to SQL Server** to select a SQL Server Database resident on the Collector.
- Click **Connect to SQL Server** if using a database on the local computer.

3 Select **Use Trusted connection** for Windows Authentication (the default option), or deselect this option and use a valid SQL Login ID and Password.

INTERNET THREAT DATABASE UPDATE

Your Internet Threat Database is important in helping you to identify the nature of Web destinations being accessed on your network. Internet Threat Database updates are produced daily and can vary in size. SurfControl recommends that you schedule this event to take place every day at a time when Internet traffic is low.

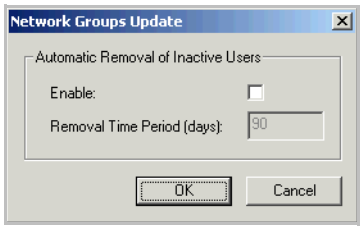
Caution: Internet Threat Database Updates are only available to licensed product users or products within the 30 day evaluation period.

NETWORK GROUPS UPDATE

To update your Network Groups:

1 Make sure you have set up the occurrence options first, then click **Configure**.

2 A Network Group Lookup Configuration dialog box will appear as shown in the figure below.



3 If you enable the **Automatic Removal of Inactive Users** option, users who do not belong to a network group, and whose last monitored connection was more than 'N' days ago, will be removed from the database along with their connection information. 'N' is the figure set in the Removal Time Period (days) field. The default setting is 90 days.

4 Click **OK** to confirm the network Group Update.

Appendix

Contact Technical Support . . . . . page 146
Sales and Feedback . . . . . page 148

CONTACT TECHNICAL SUPPORT

Websense provides technical information about SurfControl products online 24 hours a day, including:

- latest release information
- searchable Knowledge Base
- show-me tutorials
- product documents
- tips
- in-depth technical papers

Access support on the Web site at:

www.websense.com/SupportPortal/

If you need additional help, please fill out the online support form at:

www.websense.com/SupportPortal/Contact.aspx

Note your case number. If you need to send Support files to help us diagnose your problem, do the following:

1. Select **Start > SurfControl Web Filter > Support Tools > Create Web Filter Support Files**. This creates an e-mail message containing a copy of your configuration files that will help Support to discover the reason for any problems you are having. These include:
   - Event Logs (System and Application)
   - A list of file Versions
   - Registry Keys
   - System Information
   - Trace Logs
2. Add your case number to the subject line of the email message.
3. Navigate to C:\Program Files\SurfControl\Web Filter\Support. In this directory you will find the following files:
   - Application.evt
   - System.evt
   - FileVersion.txt
   - registry.txt
   - systeminfo.txt
4. Zip or rar these files and attach them to the email.
5. Press Send.

If your issue is urgent, please call one of the offices listed below.

Location	Contact information
North America	+1 858-458-2940
France	Contact your Websense Reseller. If you cannot locate your Reseller: +33 1573 232 27
Germany	Contact your Websense Reseller. If you cannot locate your Reseller: +49 6951 709 347
UK	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
Rest of Europe	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
Middle East	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
Africa	Contact your Websense Reseller. If you cannot locate your Reseller: +44 (0) 2030 244 401
Australia/NZ	Contact your Websense Reseller. If you cannot locate your Reseller: 1-800-881-011, Access Code 800-542-8609
Asia	Contact your Websense Reseller. If you cannot locate your Reseller: +86 (10) 5884-4200
Latin America and Caribbean	Contact your Websense Reseller.

You will be routed to the first available technician, who will gladly assist you.

For the latest support information on SurfControl products, visit www.websense.com/SupportPortal/.

SALES AND FEEDBACK

For product and pricing information, or to place an order, contact Websense. To find your nearest Websense office, please visit our web site: www.websense.com

INDEX

A
Active Directory
  LDAP connection 101
  SSL connection 101
Active Directory Domain Object 60
After work object 75
Allowance Objects
  10Mbyte Volume object 78
  30 Minute Time object 79
Audio Files 12, 83
Auto Categorization 106

B
Browse Time Sensitivity 79

C
Catch up mode notifications 114
Categorization Method 37, 46, 50
Category Object 67
Change Web Filter Groups 42
Company & Intranet 37
Company Domains and Intranet Sites 106
Compressed Files 12, 83
Connection Duration 37
Connections 36
Content Protection 52
Custom Categories 68
Custom Categorization - VCA
  List Of Destinations Tab 119
  Results tab 122
  Settings tab 121
  VCA Service 124
Custom Filters 35
Customer Feedback 106

D
Database
  Create a New SQL Server Database 128
  Database Management
    Archive 130
    Delete 131
    Purge 130
    Restore 132
  Database Tab 112
  Status 32
Deny Pages 84
Destination 37
  Set Category 48
  Submit to SurfControl 47
Document Files 12, 83

E
E-mail Notifications 7, 114
Enterprise User Monitoring (EUM) 110
Executables 12, 83

F
Feeds 12, 83
File Type Groups 39
First Access 36

H
Heartbeat Interval 111
Hosts and Domains object 61, 64
HTTP Deny Page Objects
  Allowance 85
  Constructing Deny Pages 86
  Default 84
  Other Deny Page objects 86

I
Ignored Ports tab 108
  Creating new ports 109
  Deleting Ports 109
  Editing Ports 109
Image Files 12, 83
Internet Threat Database license reminders 114

L
Last Access 36
Last IP Address 36
Last Workstation 36
Licensing
  Web Filter 18

M
MAC Address 62, 65
Maintenance Tools 53
Maximum Clients for Real-Time Monitor 111
Monitor new users 10
Monitor Setting 36
Monitor to Database 105
  Automatic 105
  Manual 105
    Database Updater tool 105
    Scheduled Event 105
Monitored Data
  Categories 49

Data 34
Destinations 45
Filters 34
Users 36
Monitored Destinations object 64

N
NetBIOS 110
NetWare Domain object 60
Network Settings 104
Notify Objects
NT Domain object 60

O
Other e-mail alerts 115

P
Page level information 10
Port Number for Real-Time Monitor 111
Precise Bandwidth Controls 73
Privacy Edition
Changes to Monitored Data 20
Changes to Real-Time Monitor 20
Changes to Reports 21
Protocol Signatures Tab 107
Detecting Skype 107
Enable Protocol Signature Scanning 107
Protocols 11, 40

R
Real-Time Monitor
Collector Details 94
Real-Time Monitor Timeout 111
Remote Administration Client 16
Rules
Objects 59
Types 56

S
Scheduled task failures 114
Scheduler
Options 144
Scheduled Events
Database Management 142
Database Update 143
Internet Threat Database Update 144
Scripting 12, 83
Server Info 32
Server Information Dashboard 32
Service Status 32
Service status changes 114
Site name resolution 105
SmartScan 68, 106
Subnets
Ignore Settings 103
SurfControl Categories 64, 67
SurfControl icon 98

T
TCP/IP Name Resolution (DNS) 105
Threat Management Tools 52

U
User Defined Where Objects 64
User-defined Who Objects 61
Username Resolution 109

V
Video Files 12, 83

W
Web Filter Dashboard 30
Web Filter Settings
Active Directory 101
Advanced 104
Categorization 106
Database 112
E-mail Notifications 114
Ignored Ports 108
Protocol Signatures 107
Real-Time Monitor 111
Start/Stop Service 100
Subnets 102
User Name Resolution 109
Web Pages 12, 83
Weekends object 76
What Lists 74
What Objects 70
Where Lists 69
Where Objects 64
Who Lists 63
Who Objects 60
Workstation name resolution 105
Worktime object 77